Microsoft®

microsoft® office 365

Connect and collaborate virtually anywhere, anytime

KATHERINE MURRAY

Microsoft®

Microsoft©
Office 365

Connect and Collaborate
Virtually Anywhere, Anytime

KATHERINE MURRAY

PUBLISHED BY
Microsoft Press
A Division of Microsoft Corporation
One Microsoft Way
Redmond, Washington 98052-6399

Copyright © 2011 by Katherine Murray

All rights reserved. No part of the contents of this book may be reproduced or transmitted in any form or by any means without the written permission of the publisher.

Library of Congress Control Number: 2011932154
ISBN: 978-0-7356-5694-9

Printed and bound in the United States of America.

First Printing

Microsoft Press books are available through booksellers and distributors worldwide. If you need support related to this book, email Microsoft Press Book Support at mspinput@microsoft.com. Please tell us what you think of this book at http://www.microsoft.com/learning/booksurvey.

Microsoft and the trademarks listed at http://www.microsoft.com/about/legal/en/us/IntellectualProperty/Trademarks/EN-US.aspx are trademarks of the Microsoft group of companies. All other marks are property of their respective owners.

The example companies, organizations, products, domain names, email addresses, logos, people, places, and events depicted herein are fictitious. No association with any real company, organization, product, domain name, email address, logo, person, place, or event is intended or should be inferred.

This book expresses the author's views and opinions. The information contained in this book is provided without any express, statutory, or implied warranties. Neither the authors, Microsoft Corporation, nor its resellers, or distributors will be held liable for any damages caused or alleged to be caused either directly or indirectly by this book.

Acquisitions and Developmental Editor: Rosemary Caperton
Editorial Production: Waypoint Press
Technical Reviewer: Mitch Tulloch; Technical Review services provided by Content Master, a member of CM Group, Ltd.
Copyeditor: Roger LeBlanc
Indexer: Christina Yeager
Cover: Twist Creative · Seattle

To all users of technology who are willing to take a chance,
make a choice, and try a new way of doing things so that
we can nurture and enjoy a happy, healthy planet.

—K.M.

Contents

Introduction *xvii*

Part I Finding Your Place in the Cloud

Chapter 1 What's Happening with the World of Work? 3

- Teams, Teams Everywhere—In the Office and Outside of It 4
- Worldwide Collaboration Is Here 5
- Going for the Green—With Groups of All Sizes 6
- Heads in the Cloud (Computing) 7
- A Closer Look at Office 365 8
    You Can Use What You've Got 9
    Big-Time Security 9
    Keep It Simple with the Office 365 Home Page 10
    Stay in Touch with Outlook 11
    Sync Your Team with Microsoft SharePoint 13
    Real-Time Connection with Microsoft Lync 14
    Work with Office Web Apps 16
- What's Next 16

Chapter 2 Getting Started with Office 365 17

- Creating Your Office 365 Account 18
- A Look Around the Office 365 Home Page 19

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

- Setting Up a Profile 21
    - Changing Your Password 22
    - Changing Your Profile Picture 23
    - Setting Office 365 Preferences 24
- How Does All This Work? 26
- What's Your Service? Different Setups, Different Services 27
- Getting Ready to Use Office 365 28
    - Installing Microsoft Lync 28
    - Getting Ready to Use Office 2010 31
    - Setting Up Your Mobile Phone 35
- How Office 365 Meets Small Business Needs 36
    - The Big Picture: Online and Off 37
    - Email, Calendars, Meetings, and More 37
    - Creating a Team Workspace 38
    - Sharing Documents with Your Team 39
    - Instant Messaging, Calls, and Web Meetings with Microsoft Lync 40
    - Behind-the-Scenes Support: Security and Reliability 41
- What's Next 41

Chapter 3 Administering an Office 365 Account 43

- Are You an Administrator? 43
- An Overview of Your Administrative Tasks 45
- First Things First: Key Tasks to Complete 46
- Adding and Managing Office 365 Users 47
    - Adding Users 48
    - Changing Passwords 54
- Viewing Domain Properties 55
    - Adding a Domain to Office 365 56
- Setting Up and Managing Outlook and Exchange 57
    - Create a Distribution List 59

  - Add External Contacts 60
  - Migrate Your Email 61
- Setting Up SharePoint Online 62
  - Adding Users for SharePoint Online 62
  - Assigning User Permissions 64
- Configuring Lync Online 67
  - Set External Communications 67
  - Modifying User Information 68
  - Setting Up Dial-in Conferencing 68
- Managing Your Subscriptions 70
- Getting Help with Office 365 71
  - Creating Service Requests 72
  - Checking System Status 74
- What's Next 76

Part II Teamwork in the Cloud

Chapter 4 What Your Team Can Do with Office 365 79

- Starting with the End in Mind 80
- Creating a Shared Space 81
  - Displaying the Team Site 82
  - Working with Document Libraries 84
  - Creating a Space for Announcements 85
- Sharing Calendars Securely 86
- Translating Content on the Fly 88
- Making Instant Contact with Team Members 89
- Holding Online Meetings 90
- Broadcasting Presentations Online 92
- Creating and Modifying a Website 93
- What's Next 94

Chapter 5 Creating Your Team Site with SharePoint Online 95

- Planning Your Team Site 96
- Creating a Simple Team Site—Fast 96
- Putting Some Thought into the Team Site Design 97
- Choosing a Site Theme 99
- Changing the Text Layout of Your Page 101
- Posting an Update 103
- Adding and Formatting Pictures 105
    Editing Your Picture 107
- Adding a New Page 109
- Entering and Editing Content 110
    Formatting Your Text 110
    Adding Text Styles 111
    Applying Markup Styles 112
    Coding for Language 112
- Adding Web Parts 113
- Sharing Your Site 115
- What’s Next 116

Chapter 6 Posting, Sharing, and Managing Files 117

- What Is a Document Library (and Where Is It)? 117
- Creating a Document Library 119
    Adding Documents 120
- Organizing Document Libraries 122
    Ordering Files in Your Document Library 123
    Modifying the Current View 124
    Adding a New Column to the Document Library 128
    Creating a New View for Your Document Library 129
    Switching Views 130
- Working with Document Library Files 130
    Adding a New Library Folder 132

  - Starting a New Document 132
  - Viewing File Properties 133
  - Checking Out and Checking In Files 134
  - Setting Alerts 136
- What's Next 136

Chapter 7 Adding and Managing Workflows 137

- Introducing Office 365 Workflows 137
- Creating a New Workflow 139
  - Setting Workflow States 141
  - Specifying Task Details 142
  - Editing Your Workflow 144
- Using a Workflow for Your Project 145
  - Checking Workflow Status 145
  - Completing a Workflow Task 146
  - Stopping a Workflow 148
- Managing Workflows 149
- What's Next 149

Chapter 8 Working with Office 2010 Web Apps 151

- A First Look at Office Web Apps 152
  - Introducing Office Web Apps 153
  - How Office Web Apps Work 154
  - Web Apps on Your Phone 156
  - What You Can—and Can't—Do with Office 365 156
- Creating, Saving, and Closing a New File 157
- Working with an Existing File 158
- Choosing Your Tools 160
- Levels of Editing in Office Web Apps 161
  - Viewing Your File in Office 365 161
  - Editing in Your Web Browser 162
  - Taking It to the Desktop 163

- Co-authoring with Office Web Apps 165
  - Editing in the Browser 166
  - Another Way to Co-author in Office 365 167
- Reviewing and Editing Excel Worksheets 168
- Working with OneNote Notebooks 169
- What's Next 172

Chapter 9 Going Mobile with Office 365 173

- How Will You Use Your Phone with Office 365? 174
- Receiving and Sending Email on Your Phone 175
- Using the Office Hub on Your Windows Phone 7 179
- Last-Minute Word Editing on Your Mobile Device 182
  - Editing a Word Document on Your Phone 183
  - Adding Comments 185
  - Formatting Text 187
  - Saving and Sending Your Edited Document 189
- Reviewing and Updating Excel Data 190
  - Working with the Worksheet 191
  - Making Simple Editing Changes 192
  - Saving and Sending Worksheet Changes 194
- Tweaking a PowerPoint Presentation on Your Phone 195
  - Mobile Editing for Your Presentation 196
  - Saving and Sending Your Presentation 198
- What's Next 199

Part III Connecting in Real Time

Chapter 10 Email and Organize with Office 365 203

- Introducing Outlook Web App 203
- Checking and Managing Email 204
    - Checking, Reading, and Responding to Your Mail 205
    - Creating a New Message 206
    - Changing Mail Views 208
    - Choosing a New Theme 209
    - Managing Your Mail 210
    - Setting Mail Preferences 215
    - Creating a Meeting Request 216
- Working with Your Calendar 218
    - Adding an Appointment 219
    - Changing Your Calendar View 220
    - Sharing Your Calendar 221
- Importing and Managing Your Contacts 224
    - Adding New Contacts 224
    - Importing Contacts 225
    - Searching for a Contact 226
- Adding and Completing Tasks 227
- What's Next 228

Chapter 11 Talking It Over with Microsoft Lync 229

- Introducing Microsoft Lync 230
    - Signing In to Lync 230
    - Getting Started with Lync 232
    - Entering a Personal Note 233
    - Setting Your Location 233
    - Setting Up Sound and Voice 234

- Working with Contacts in Lync 236
  - Creating a Contact Group 237
  - Accepting a Contact Request 239
  - Setting Privacy Levels for Contact Relationships 240
  - Tagging Contacts 241
  - Changing Contact Views 243
  - Working with Presence and Contact Cards 244
- Instant Messaging with Your Team 245
- Making a Call with Lync 248
  - Launching a Video Call 249
- Sharing Programs and Files 250
  - Sharing Your Desktop 251
  - Sharing Programs 252
  - Using a Whiteboard 253
- What's Next 254

Chapter 12 Designing Your Public Website 255

- Getting Started with Your Public Website 256
  - Making Simple Web Changes 256
  - Setting Up Your Site 258
  - Applying a Page Background 259
- Choosing a Theme and Header Style 260
  - Changing the Site Header 261
  - Add a Logo to Your Site 262
- Choosing a Custom Color Scheme 263
- Adding and Formatting Text 264
  - Formatting Your Headings 265
  - Creating Lists 266
  - Adding Hyperlinks 267

- Inserting, Formatting, and Aligning Images 269
  - Formatting Your Picture 270
  - Setting the Alignment for Images 271
- Adding and Organizing Pages 271
- Selecting a Navigation Layout 273
- Adding Gadgets to Your Site 275
- Optimizing Your Site for Web Search Results 276
- Previewing and Publishing Your Site 277
- What's Next 278

Chapter 13 Integrating All Parts of Office 365 279

- Using It All Together—Online and Off 279
  - Checking a File Out of Your Document Library 280
  - Checking a File in After You're Done Working on It 280
  - Saving Files to Your Computer 281
  - Saving Files to Your Document Library 282
- Getting Productive with Office 365 284
- Creating an Annual Report 284
  - Thinking Through Your Content 284
  - Planning for Production 285
  - How Office 365 Helps Facilitate the Process 285
- Tracking a Sales Promotion 287
  - Thinking Through Your Approach 288
  - Planning for Production 288
  - How Office 365 Can Help with Your Sales Promotion 288
- Preparing an Online Training Module 290
  - Thinking Through Your Training 290
  - Planning for Production 290
  - How Office 365 Can Help with Your Online Training 291
- Happily Ever After...in the Cloud 292

Appendix A Extras for Great Teams 293
- Thinking Through Your Group Process 294
- Team Contact List 294
- Excel Worksheet with Licenses and Permissions 295
- Meeting Agenda Template 295
- Tips for Your Team Site 296
- Proposal Checklist 297
- Marketing Checklist 297

Index 299

What do you think of this book? We want to hear from you!

Microsoft is interested in hearing your feedback so we can continually improve our books and learning resources for you. To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

About the Author

Katherine Murray has been writing about technology since the mid-1980s, which means that over the years she's seen lots of changes in the way technology is used. She loves the potential cloud computing offers and often writes about software that enables us to connect and collaborate in a variety of ways. The author of *Microsoft Office Plain and Simple* (Microsoft Press, 2010), *Microsoft Word Plain and Simple* (Microsoft Press, 2010), *Microsoft Word Inside Out* (Microsoft Press, 2010), and co-author of *Green Home Computing for Dummies* (Wiley, 2009), Katherine is a member of the Society of Environmental Journalists and writes frequently about earth care topics. She also writes regularly about Microsoft Office and other software for CNET's TechRepublic and Windows Secrets.

Introduction

LET'S HEAR IT for freedom. Freedom from your desk. Freedom from those boring managers' meetings. Freedom to work anywhere, with anyone, anytime, on almost any device. Sounds good, right?

Office 365 is Microsoft's smart and simple answer to cloud computing. Using the various programs in Office 365, you can do all the tasks you're used to doing in your favorite Office applications—write documents, create presentations, check email, manage your calendar, crunch numbers, and more—and then share what you create in real time on a team site, design and publish a website, and even create and host live online meetings while you're traveling on the train, sitting in a coffee shop, or dialing in on your phone.

This book shows you how you can use cloud computing—and specifically, Office 365—to get more done, collaborate more easily, and work more flexibly than you ever have before. From the necessary how-tos about creating and administering your Office 365 account and working with the various Office 365 programs to sharing files with your team, creating a team site, using Office Web Apps, and holding online meetings, you'll discover how easy it is to work online and off, accessing and sharing your files whenever you need to. After you learn about each of the core programs, you can try strategies for building successful teams, and get some good ideas on practical ways you can put all this cloud power to work.

Who This Book Is For

Microsoft Office 365: Connect and Collaborate Virtually Anywhere, Anytime is all about cloud solutions for small businesses, focusing on the core software services (Microsoft Exchange Online, Microsoft SharePoint Online, Office Web Apps, and Microsoft Lync), and demonstrating ways you can create, manage, and lead teams effectively using the communications and collaborative online tools.

You'll find helpful ideas and solutions in *Office 365* if you

- Own or work in a small business and want to be flexible where and when you work.
- Need to collaborate with others near or far.

- Want to store and work with files online from any point you have web access.
- Lead a team online or face to face.

What Is Cloud Computing?

The phrase *cloud computing* brings to mind for me the feeling of stretching out on a hillside on a summer day while my sons pointed out the animals and shapes they saw in the clouds above. Cloud computing is a little like that—the ability of your technology to take on the shape you need for the type of project you need to accomplish. Want to put together a project team? You can do that in the cloud so that team members all over the globe can collaborate and communicate easily. Need to create a meeting space for your regional sales reps? You can create a team site for everyone in the cloud, using web servers and software, and you can enable every person to log in from any point they have access to the web.

So where is this *cloud*? The real definition of the phrase *cloud computing* simply means the ability to access files and applications online through multiple devices—your computer, browser, or phone. Microsoft has already been offering cloud services through the web in various ways:

- Windows Live SkyDrive is one of the Windows Live Services, a free web-based application that enables you to save, store, organize, and share files easily.
- Microsoft Office Web Apps are available for Word 2010, PowerPoint 2010, Excel 2010, and OneNote 2010, making it possible for you to save and work with your Office files online and collaborate with other authors. Office 2010 Web Apps are free to registered Office 2010 users.
- Microsoft Office Live Small Business is a web-based suite of services that enable you to create and market a website, communicate with others by email and instant messaging, and store and share files online. The basic services are free, and you can add specialty features for a monthly fee.
- Microsoft Business Productivity Online Suite (BPOS) is a suite of messaging and communications programs designed to provide the kind of collaboration support companies need. BPOS includes Microsoft Exchange Online, Microsoft SharePoint Online, Microsoft Office Communications Online, and Office Live Meeting, all for a monthly, per-user fee.

The best news about cloud computing for you as an end user is the added flexibility the services offer you, without additional investment in either hardware or software. You can simply use your web browser—which is open anyway, right?—to get to the files you need to work with, make any changes, and save and share the files as you see fit.

The great thing about cloud computing for companies is that it enables them to expand the services they offer both staff and customers without adding to their own hardware infrastructure. Web services enable companies to connect workers and make collaboration possible on a global scale without adding servers, setting up datacenters, and more. The environment is secure, flexible, and expandable to accommodate as many users as businesses need to support.

Introducing Office 365

Microsoft Office 365 is Microsoft's latest venture into cloud computing, bringing together tried-and-true programs that make communicating and collaboration natural online. Office 365 includes Microsoft Exchange Online for email and scheduling, Microsoft SharePoint Online for sharing files and creating team sites, and Microsoft Lync Online for instant messaging and online meeting. Office 365 mixes the capabilities of those programs with cloud versions of Office Professional Plus programs.

What Cloud Computing Means for You

Office 365 makes using Office in the cloud a simple, natural, and affordable way to make the most of services you are already familiar with, in ways that easily extend the technology you are probably already using. Sound too good to be true? It's not. Office 365 enables you to easily and naturally

- Collaborate globally in real time.
- Use programs you already know.
- Create a virtual office where you can work with information securely while you're on the go.
- Use your PC, browser, or phone interchangeably.
- Keep your information secure.
- Keep your hardware costs down.
- Use multiple devices to access and work with files.

- Create a shared team site.
- Boost productivity by making it easy for people to work together.
- Give users instant access to each other with presence technology and instant messaging.
- Incorporate social networking in your team communication.

Office 365 Versions

Because different types of organizations and businesses have different needs, three different versions of Office 365 are available for end users. These three versions are

- **Office 365 for small businesses** Small businesses and professionals who don't have large IT requirements will find just the set of tools they need in Office 365 for small businesses. This version is easy to try (free for 30 days) and then low-cost ($6 per user per month at the time of this book's publication), and it offers businesses Office Web Apps, Microsoft SharePoint Online, Microsoft Exchange Online, and Microsoft Lync for instant messaging and online meetings.
- **Office 365 for enterprises** Enterprises have larger-scale IT needs than small businesses or individuals, requiring software that can handle a large number of email accounts, messages, and attachments; provide guaranteed uptime; offer reporting and support options; and deliver Active Directory features that enable a single sign-in for end users. Office 365 for enterprises offers all these features and adds on to standard BPOS services to extend the collaboration and online meeting capabilities. Office 365 for enterprises also offers flexible plans so that businesses of different sizes can tailor the features to get just the kind of cloud support they need.
- **Office 365 for education** Educational users face a unique set of challenges—they need to provide students with access to the latest software possible, but they have to do it on a shoestring (and perhaps diminishing) budget. Cloud-based services can help users in education save money and give students the tools they need to create projects, collaborate in real time, and learn how to use software in the cloud.

WHAT DOES OFFICE 365 ADD TO BPOS?

Microsoft Business Productivity Online Standard Suite, also known as BPOS, has 40 million users all over the world. This highly successful online software suite offers communication and collaboration features that make it easy to connect in real time and work together on projects large and small.

Office 365 for enterprises extends the features of BPOS by adding Microsoft Lync for instant messaging and online meetings, Outlook Web App for management of email and scheduling, Office Web Apps, and the ability to create reports and administer the account through a web-based dashboard. The educational version of Office 365 also includes the latest version of Microsoft Live@Edu, which offers cloud solutions to thousands of schools and millions of students around the globe.

A Quick Roadmap

Microsoft Office 365: Connect and Collaborate Virtually Anywhere, Anytime is organized in three parts to help you learn about different aspects of setting up and working with Office 365.

Part I, “Finding Your Place in the Cloud,” takes a look at the way people are working in the cloud today and introduces you to Office 365. Chapter 1 looks closely at teams, both inside and outside the office environment, and it takes a look at the way Office 365 offers a greener choice for small businesses. Chapter 2 shows you how to create an Office 365 account and set up a profile, and it gives you a big-picture tour of Office 365 so that you can begin planning just what you want to do with the tools. Chapter 3 is for the team manager or person who will be managing the Office 365 site; you’ll learn how to customize the site, add mobile devices, and set up and manage Microsoft Exchange, Microsoft SharePoint, and Microsoft Lync online.

Part II, “Teamwork in the Cloud,” is your guide to setting up, organizing, managing, and helping your team be successful using Office 365. Chapter 4 spotlights all the team features you can use to get everybody on the same page, calendar-wise; you'll also find out how to share files, hold online meetings, instant message each other, and broadcast presentations. Chapter 5 walks you through creating, editing, and sharing a team site. Chapter 6 shows you how to create document libraries, share files with team members, and manage the files in SharePoint Online. You'll also find out about working with file versions, tracking file changes, and comparing and merging files. Chapter 7 shows you how to create and use workflows to keep your team moving in the right direction, and Chapter 8 introduces all things Web App by shining a light on the capabilities of the various tools and showing you how to work with files online, coauthor documents, edit worksheets, broadcast presentations, and share notebooks. Chapter 9 rounds out this part of *Office 365* by focusing on mobile technologies: find out how to use the various Office Mobile applications to review, edit, and share the files you develop with your team.

Part III, "Connecting in Real Time," shows you how to use the communication and instant-messaging options in Office 365 to stay in touch with your team in real time. In Chapter 10, "Email and Organize with Office 365," you learn how to use Outlook Web App to import and manage contacts, set email preferences, organize mail folders, work with your calendars and tasks, and more. Chapter 11, "Talking it Over with Microsoft Lync," shows you how to connect in real time to other online users through instant messaging, voice calls, and online chats. You'll learn how to manage transcripts, invite others to the conversation, and host web meetings. Chapter 12, "Designing Your Public Website," shows you how to use the web tools in Office 365 to create a website to showcase your products and services and give your customers a sense of who you are and what you offer. Chapter 13, "Integrating Office 365," presents a set of examples that show how you and your team can use the various tools in Office 365 together to create and share business projects.

Let's Get Started

Now that you have a general sense of the road ahead, let's get started using Office 365. In Chapter 1, you learn how small businesses are using cloud computing to accomplish business-critical tasks in a flexible way. You'll then get to dream a little about the cloud shapes you want *your* Office 365 to take as you begin using this powerful suite of cloud-powered tools.

Acknowledgments

One of the best things about writing books is working with the talented team that makes it all come to life. Big thanks go out to the team that made it possible for you to be holding this book in your hands today:

Thanks to my editor, Rosemary Caperton, who managed this project with expert care, championing it from the very start and helping to improve and further the idea, while dissolving obstacles, finding a path to the resources we needed, and troubleshooting problems as they arose. (I'd add "She's able to leap tall buildings in a single bound," Rosemary, but I think someone has already used that.) This book *truly* would not be here without her.

To Steve Sagman at Waypoint Press, Roger LeBlanc, and Mitch Tulloch for their many talents, expressed though their wonderful design and layout (Steve), always excellent editing (Roger), and a careful, conscientious, and constructive technical edit (Mitch).

To Michael Stroh, author of *Microsoft Windows Phone 7 Plain & Simple*, who generously contributed some of the illustrations in Chapter 9, and to Kenyon Brown, Senior Editor at O'Reilly Media (Microsoft Press Division) for his help in getting us needed resources at a critical hour.

And to Brent Watanabe, Windows Phone 7 Developer, for his suggestions and friendly help as we figured out how to capture live Office 365 mobile images to share in the book.

Thanks to one and all! Your efforts and care are very much a part of this book!

Errata and Book Support

The following sections provide information on errata, book support, feedback, and contact information.

Errata

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site at oreilly.com:

http://go.microsoft.com/FWLink/?LinkID= 221811

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, please email Microsoft Press Book Support at mspinput@microsoft.com.

Please note that product support for Microsoft software is not offered through the addresses above.

We Want to Hear from You

At Microsoft Press, your satisfaction is our top priority, and your feedback is our most valuable asset. Please tell us what you think of this book at:

http://www.microsoft.com/learning/booksurvey

The survey is short, and we read every one of your comments and ideas. Thanks in advance for your input!

Stay in Touch

Let us keep the conversation going! We are on Twitter:

http://twitter.com/MicrosoftPress

1

Finding Your Place in the Cloud

WHETHER YOU'RE just learning about cloud computing for the first time or you've been saving and sharing files online for a long time, it's plain to see that having an online component is a smart way to make sure your files are always available where and when you need them. This part of the book starts out by giving you a glimpse at how the work world is changing—setting the stage for cloud computing—and then you discover how to create an Office 365 account and set up the roles and permissions you need to get started.

CHAPTER 1

What's Happening with the World of Work?

IN THIS CHAPTER:

- Teams, teams everywhere—in the office and outside of it
- Worldwide collaboration is here
- Going for the green—with groups of all sizes
- Heads in the cloud (computing)
- A closer look at Office 365

IT'S NO SECRET that computers, the web, and social media have all dramatically changed the way we work. What we used to compose on typewriters (remember those?) or file away in clangy, metal filing cabinets, we now take care of completely electronically with just a few keystrokes and a click of the mouse button.

What you used to do by writing, printing, folding, putting in an envelope, stamping and mailing, you can now do by simply composing and clicking Send—and the message reaches the other person almost instantly.

Although you used to spend hours camped around a big boardroom table, doodling on your legal pad while someone presented a workshop that wasn't entirely relevant to your job, today you can log in to a webcast to catch the bits of a presentation that directly impact what you need to do today. And you can form teams on the fly to accomplish specific project goals and then disband the team to go back to your regular tasks.

Technology now enables us to work faster, more productively, and with more flexibly than ever. You can easily pull together the resources you need for as long as you need them and then let them go when you're done. This is a smarter use of resources—and greener, too—and it results in less overhead for your business. You don't need to add computer systems or people to work on specific project tasks that require some extra help. You can simply go to the cloud.

Teams, Teams Everywhere—In the Office and Outside of It

We seem to be in a perfect storm of technology and workforce development, where several important aspects of the way we work are coming together. Since the early '60s, the use of work teams has been on the rise. Fortune 500 companies are full of them. Most mid-sized businesses have realized that work teams can boost productivity, help managers manage, and give groups more ownership of the work they perform.

Teams enable individual workers to get together in the name of a common goal—producing the annual report, for example—and bring their own respective talents to the mix. Your work team for the annual report might include a writer, an editor, a graphic designer, a production and layout person, a corporate communications person, and someone who can provide the financial detail. And here's the good news—data is showing that working in cohesive teams boosts creativity and productivity, and people seem to be happier at work when they're part of a successful team. That's all good.

But add another new development to the mix. Now workers are often on the road, traveling from region to region, stationed overseas, or perhaps remotely accessing a corporate network from another continent. The development of new hardware options—more powerful and affordable laptops, netbooks, and smartphones, as well as improved video conferencing tools—make this easier than ever to do. In this global and mobile workforce, how will your team meet its goals? Will the editor know when the writer has finished the draft? What happens to the deadlines?

The simultaneous development of the pervasive and always-on web and the explosion in social media technologies has made it easier to stay in touch with all members of your team wherever they travel and whenever they appear. From any point of web access on the globe, your teammates can communicate with you. Nice. Working virtually has even bigger benefits as well—when a team works successfully from remote locations, there's a reduced need for centralized office space, which means lease costs for your company go down. And that daily one-hour commute into the office? Gone, if you're working from home. That saves fuel and reduces the carbon your car is pumping into the atmosphere. Those are just a couple of the large-scale benefits that, multiplied exponentially across the planet, make the world a whole lot greener.

But this brings us back to a critical question. In this flexible time of go-anywhere, do-anything work styles, how do you stay focused on your team objectives and complete your original assignment? How do you organize the work, build libraries of files you all need, meet together in the same space and time, and keep track of all the pieces of the project? Facebook isn't going to help you with that. And your email client—even if it's Microsoft Outlook 2010—is limited as far as group space goes.

That's where Microsoft Office 365 comes in. Now you have a shared team space, always available online, where you can build document libraries, share assets, assign tasks, and collaborate on all kinds of Office projects. Office 365 builds on four key technologies—Microsoft Exchange, Microsoft Lync, Microsoft SharePoint, and Office Web Apps—to give you all the tools and abilities you need as a team to be successful, no matter when or where you work.

Worldwide Collaboration Is Here

Teams form for all sorts of reasons and have all sorts of goals. Some teams are developed to meet a specific project objective—for example, putting together an annual report. There are also leadership teams, program teams, departmental teams, and formal and informal teams. Pretty much anything you want to create—short-term or long-term, with a few other people—can be done better in a team. (OK, that's an editorial opinion—but experience proves it.)

If your team involves one or more people who seem to be always on the go, you need

- A way to make files accessible to the remote worker
- A means of assigning and sharing tasks, appointments, notes, and more
- An online meeting space groups can call in to or use to gather together
- A shared site that can be accessed by multiple technologies—laptops, smartphones, et al.
- Translation tools, if your team member's primary language is different from your own or you are working on multilingual documents

If you can create a team space that provides all these types of tools, your global team can log in, share their information, get feedback, and contribute to the project in a way that makes global access a moot point. They could just as well be logging in from the coffee shop on the corner!

THE SOFTER SIDE OF GLOBAL TEAMS

Throughout this book, you'll get many ideas about ways to create and manage teams successfully. But here's something to consider if you're working with global teams: different cultures have different expectations about relationships and communication, so if your new team member is from an Asian country, trust might build more slowly—and you might need to lay more groundwork—than when you begin to work with a new teammate from Canada.

In "Tips for Working in Global Teams" (which you can find at *www.ieee.org*), author Melanie Doulton describes "high-context" and "low-context" countries. In high-context cultures—Indian, Arab, Asian, or Latin—relationships with family and colleagues is paramount, the entire relationship provides the context for communication, protocol is valued and followed, and decisions are made slowly and are often based on relationships.

In low-context cultures such as North American, Germanic, and Scandinavian cultures, communication is based less on relationships and more on facts. In other words, the message carries the meaning, whereas in higher context cultures, the relationship sets the stage for the way the message is received.

For this reason, be aware that when you're working with team members from different cultures, they might hear what you're saying differently than you think. Take time to build trust and establish relationships with your global team members and, when in doubt, check it out.

Going for the Green—With Groups of All Sizes

One of the best aspects of cloud computing is the way it uses—and conserves—resources. Instead of using millions of computers on desktops that are tied into hundreds of thousands of servers that are purchased, maintained, and repaired by thousands of individual companies, cloud computing offers a scalable alternative.

Because applications used in cloud computing are web-based, the number of servers used increases as more are needed to support the demand. The additional servers then return to rest when they're no longer needed. This share-the-load approach, on a large scale, saves electricity, reduces the need for hardware components, and increases the efficient use of the resources used to provide the services.

As part of a green strategy, companies can choose to use cloud computing to

- Downsize or offset their office space
- Expand their ability to work globally
- Support a mobile workforce
- Reduce use of consumable office supplies (paper, ink, file storage)
- Reduce computer hardware (desktop computers and server systems)

Heads in the Cloud (Computing)

So what are companies doing in the cloud today? IBM commissioned a survey in July 2009 ("Dispelling the vapor around cloud computing," which you can find at *www.ibm.com*) to check the pulse of cloud adoption, and they found that many groups are considering cloud computing in various forms. The survey included respondents who work in communications, financial services, the industrial sector, and public services. The following table shows the distribution of respondents by country.

TABLE 1-1 IBM Survey Participants by Country

Country	Percentage
Canada	5
China	10
France	10
Germany	10
India	15
Japan	11
UK	9
USA	30

Many companies are already using or are open to using private cloud computing for the following functions:

- Business continuity and disaster recovery
- Data mining
- Data warehouses

- Long-term data archiving
- Security
- Testing environment infrastructure

A smaller percentage of companies have adopted a public cloud approach, which includes the following capabilities:

- Audio/video/web conferencing
- Data center network capacity
- Desktop
- File storage
- Server
- Service help desk
- Test environment infrastructure
- Training and demonstration
- Voice over Internet (VoIP) infrastructure
- Wide area network (WAN) capacity

Office 365 enables you to create a cloud computing approach that offers just what your business needs require. The four main technologies—Exchange, SharePoint, Office Web Apps, and Lync—enable you to stay in touch by email and scheduling, create a shared team site (for both intranets and the Internet), collaborate on all sorts of projects using familiar Office applications, and stay in touch with instant messaging and video conferencing. The next section gives you a bird's-eye view of the features in Office 365.

A Closer Look at Office 365

Office 365 makes it easy for you to work with the applications and programs you're familiar with in the easy-access, always-on world of the web. You can use Office 365 to

- Create a shared team site where you create data libraries, assign tasks, schedule calendars, and more

- Check everyone's availability, and schedule online meetings
- Connect instantly by instant messaging, email, or video calls
- Keep your files and user accounts secure and keep email safe from spam and scams
- Create documents, worksheets, presentations, and notebooks, and share them seamlessly
- Always work with current updates of Office 365 software
- Create blogs and wikis for your team and for public view

You Can Use What You've Got

One of the big features of Office 365 is the software's ability to work with whatever device you're using at the moment—your desktop PC or Mac, laptop or netbook, Android phone, iPhone, Windows Phone, Nokia, or BlackBerry.

You can log in to your Office 365 account, work on files, share documents, update tasks, post to your discussion forum, join a meeting, send instant messages, and more—from wherever you are at the moment, with whatever device you've got. Sweet!

Big-Time Security

Office 365 invests in state-of-the-art security, reliability, and recovery technology to ensure that your files and messages are secure, your data is safe, and you are always able to access and work with your information. Office 365 offers

- A guaranteed 99.9% uptime Service Level Agreement
- Data centers with SAS 70 and ISO 27001 certification
- Geo-redundant, enterprise-grade reliability and disaster recovery
- Multiple data centers and automatic failovers to ensure your data is safeguarded
- Up-to-date antivirus and anti-spam protection

THE IMPORTANCE OF UPTIME

One of Office 365's big promises—and something its users depend on—is the guaranteed 99.9 percent uptime promise. This means that your team site, your files, your public website, and all the tools you need will be accessible online 99.9 percent of the time. This might sound like marketing lingo, but it's an important promise for teams and companies that run the majority of their business processes in the cloud.

Nowhere was this need more evident than in a recent cloud outage suffered by Amazon's cloud services. In April 2011, a simple error in one availability zone started a domino-like effect that affected other areas, which resulted in a "re-mirroring storm" that overwhelmed cloud capacity temporarily. This affected a number of sites—for example, FourSquare, HootSuite, Quora, and Reddit—and caused a temporary outage.

Microsoft is providing a financially backed service level agreement (SLA) for Office 365 users and has designed Office 365 as a comprehensive geo-redundant service so that data is replicated between geographically distant sites. This means if one site experiences a failure, other sites around the world can continue the processing so that Office 365 users won't experience any loss of services.

Keep It Simple with the Office 365 Home Page

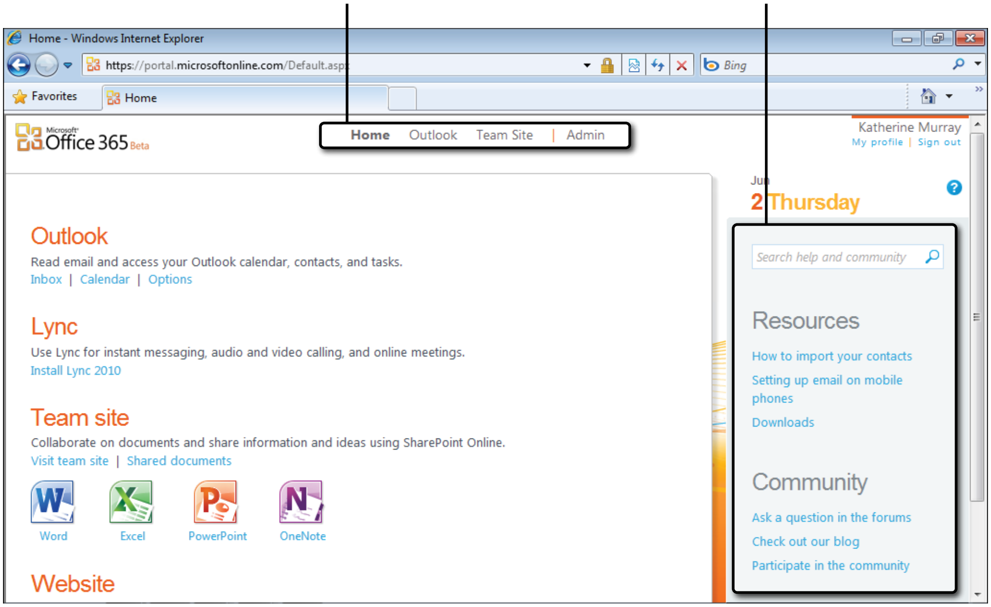
When you first log in to Office 365, you see a simple and clear home page that shows you how to get started with the tools you want to use. The various tools you'll use in Office 365 are all available on that first page, making it easy for you to find your way around and get to the tools you need. This clean screen design also makes it easy for you to navigate, regardless of whether you're viewing the site on your PC, in your browser, or on your smartphone.

As you can see in Figure 1-1, the navigation bar at the top of the window gives you easy access to the primary views in Office 365. You can get back to your Home page from any of the other pages; you can click Outlook to work with mail, schedules, and tasks; or you can click Team Site to display your SharePoint team site. If you are the administrator of the Office 365 account, you can also click Admin on the Home page to access another screen where you can set up the various programs the way you want them, add and manage users, and set up the domains you want to use.

What's an administrator? A person with administrator privileges in Office 365 is able to create new accounts, set up users, configure the services they'll use (for example, Microsoft Exchange, Microsoft Lync, or Microsoft SharePoint), set permissions, and get updates to the software. If you have administrator privileges, check out Chapter 3, "Administering an Office 365 Account."

Choose other Office 365 views.

Get help with Office 365.


Home - Windows Internet Explorer
https://portal.microsoftonline.com/Default.aspx
Bing
Favorites
Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Jun
2 Thursday
Search help and community
Resources
How to import your contacts
Setting up email on mobile phones
Downloads
Community
Ask a question in the forums
Check out our blog
Participate in the community
Outlook
Inbox | Calendar | Options
Lync
Install Lync 2010
Team site
Visit team site | Shared documents
Word
Excel
PowerPoint
OneNote
Website

Read email and access your Outlook calendar, contacts, and tasks.

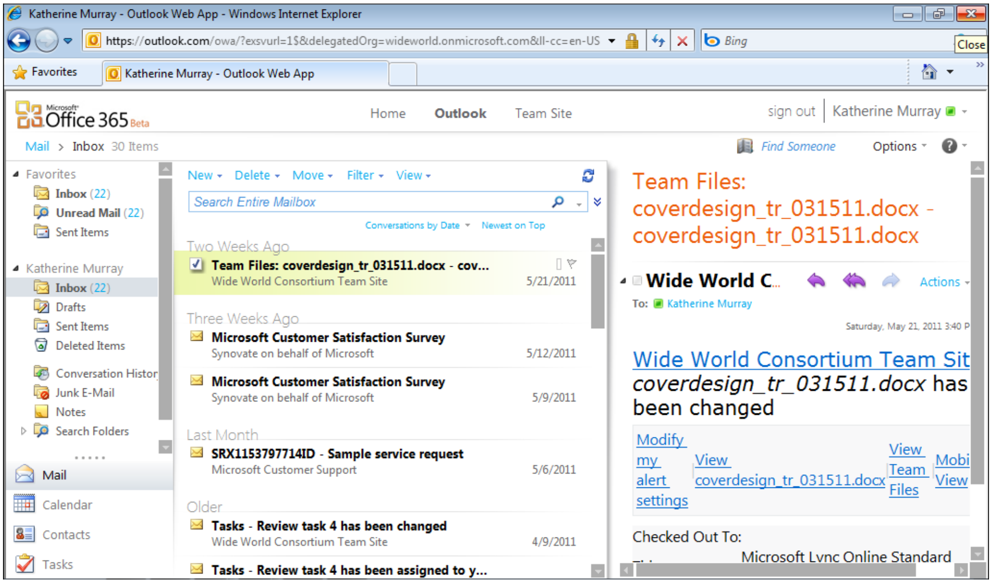
Use Lync for instant messaging, audio and video calling, and online meetings.

Collaborate on documents and share information and ideas using SharePoint Online.

FIGURE 1-1 The Office 365 Home page makes it easy to begin setting up your space in the clouds.

Stay in Touch with Outlook

When you click Outlook at the top of the Office 365 window, you are taken to the Outlook view, where you can check email, compose new messages, organize your mail, add appointments to your calendar, create notes, and add tasks. (See Figure 1-2.) If you've used Outlook Web App in the past, Outlook in Office 365 will look very familiar to you.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/?exsvurl=1$&delegatedOrg=wideworld.onmicrosoft.com&ll-cc=en-US
Bing
Close
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (22)
Unread Mail (22)
Sent Items
Katherine Murray
Inbox (22)
Drafts
Sent Items
Deleted Items
Conversation Histor
Junk E-Mail
Notes
Search Folders
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Actions

Two Weeks Ago

Team Files: coverdesign_tr_031511.docx - cov... Wide World Consortium Team Site 5/21/2011

Three Weeks Ago

Microsoft Customer Satisfaction Survey Synovate on behalf of Microsoft 5/12/2011

Microsoft Customer Satisfaction Survey Synovate on behalf of Microsoft 5/9/2011

Last Month

SRX1153797714ID - Sample service request Microsoft Customer Support 5/6/2011

Older

Tasks - Review task 4 has been changed Wide World Consortium Team Site 4/9/2011

Tasks - Review task 4 has been assigned to y...

Team Files: coverdesign_tr_031511.docx - coverdesign_tr_031511.docx

Wide World C...

To: Katherine Murray

Saturday, May 21, 2011 3:40 P

Wide World Consortium Team Sit

coverdesign_tr_031511.docx has been changed

Modify my alert settings | View coverdesign_tr_031511.docx | View Team Files | Mobi View

Checked Out To:

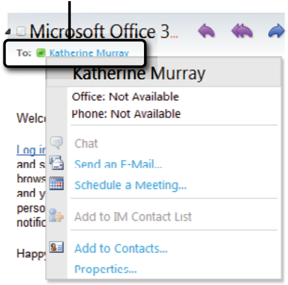
Microsoft Lync Online Standard

FIGURE 1-2 The Outlook view, which includes tools for organizing email and contacting colleagues and friends.

The folder view on the left side of the screen is where you manage and file away all the mail you receive. You can create new folders and subfolders as needed, just like you do in your desktop version of Outlook. Click Mail, Calendar, Contacts, or Tasks in the lower left corner of the screen to choose the view you want to use to add, modify, review, or delete those different types of information. The center column of the Outlook window shows you the contents of the folder you've selected (in this case, the Inbox folder). In the far right panel, you see the contents of the currently selected message. This type of display enables you to scan your email quickly without opening and paging through each message, saving you time and trouble as you move quickly through your mail.

Also in the Outlook view, you can use the presence icon of a contact (located to the left of that person's name) to see his or her online availability. If the icon is green, your contact is available online. When you click the icon, a list of contact options appears, giving you a range of choices for contacting the person. You can send an email message, schedule a meeting, invite the person to chat, and more. (See Figure 1-3.)

Click the presence icon for direct contact options.


Microsoft Office 3...
To: Katherine Murray
Welc
Log in
and s
brows
and y
perso
notific
Happ
Chat
Send an E-Mail...
Schedule a Meeting...
Add to IM Contact List
Add to Contacts...
Properties...

Katherine Murray

Office: Not Available

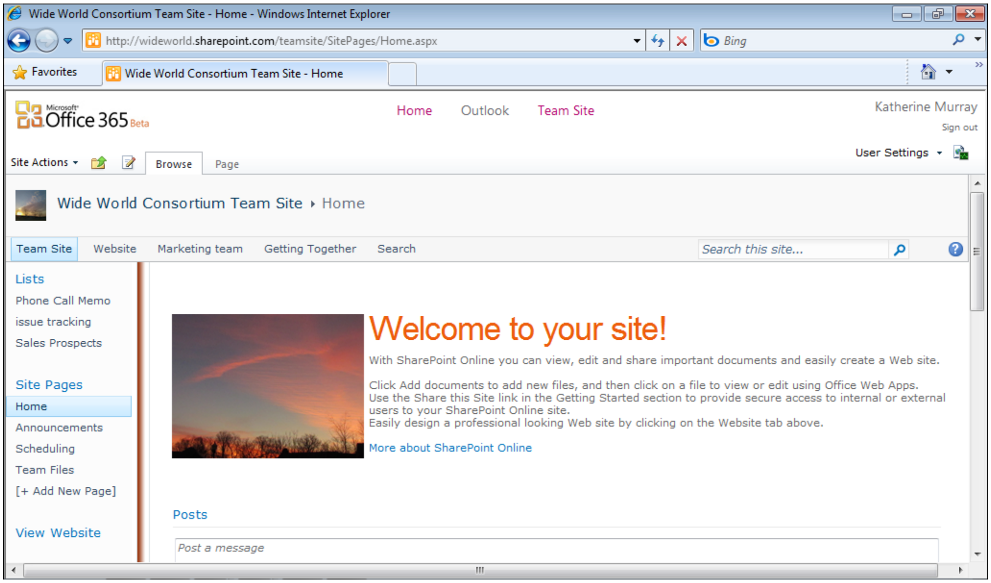
Phone: Not Available

FIGURE 1-3 You can click the presence icon to display options for contacting someone online.

Sync Your Team with Microsoft SharePoint

If you're organizing and managing a team effort, chances are you'll spend lots of time in SharePoint. SharePoint makes it easy for you to create both a team site—where you can communicate with team members, create document libraries, and more—and a public website, for the information you want to show the world.

When you click Team Site at the top of the Office 365 window, your SharePoint site appears, looking similar to the one shown in Figure 1-4. Here you can design your team site, adding content and images and choosing a theme.


Wide World Consortium Team Site - Home - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/SitePages/Home.aspx
Bing
Favorites
Wide World Consortium Team Site - Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
Page
Wide World Consortium Team Site ▸ Home
Team Site
Website
Marketing team
Getting Together
Search
Search this site...
Lists
Phone Call Memo
issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
More about SharePoint Online
Posts
Post a message

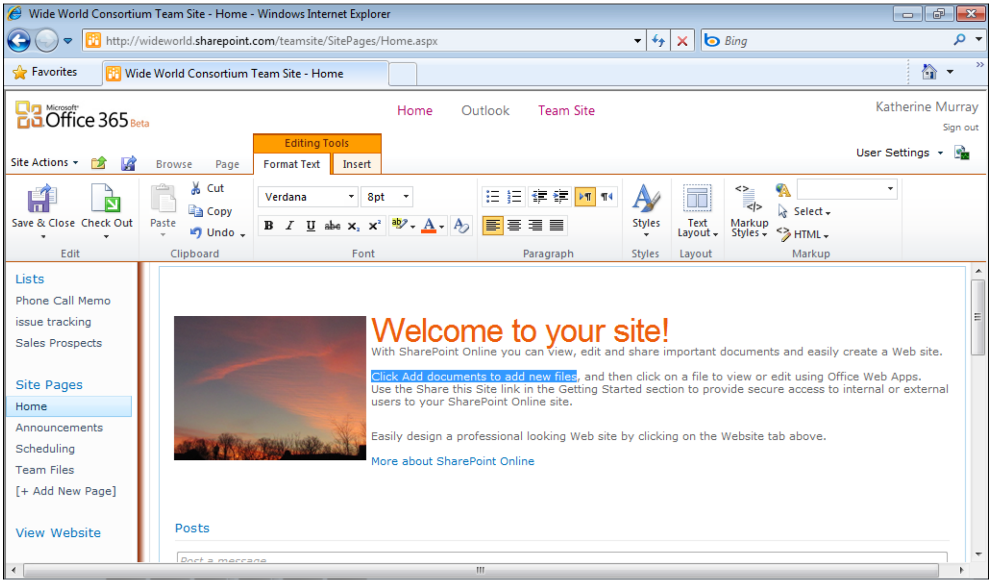
Welcome to your site!

With SharePoint Online you can view, edit and share important documents and easily create a Web site.

Click Add documents to add new files, and then click on a file to view or edit using Office Web Apps.
Use the Share this Site link in the Getting Started section to provide secure access to internal or external users to your SharePoint Online site.
Easily design a professional looking Web site by clicking on the Website tab above.

FIGURE 1-4 Clicking Team Site displays the SharePoint site your group can use as a common workspace.

You can click the Edit tool to the left of the Browse tab to display the editing tools for the SharePoint site. The Ribbon changes to display the Editing Tools tab, which enables you to format the text on your page and insert new page elements such as pictures, videos, tables, and more. (See Figure 1-5.)


Wide World Consortium Team Site - Home - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/SitePages/Home.aspx
Bing
Favorites
Wide World Consortium Team Site - Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup
Lists
Phone Call Memo
issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Posts
Post a message

Welcome to your site!

With SharePoint Online you can view, edit and share important documents and easily create a Web site.

Click Add documents to add new files, and then click on a file to view or edit using Office Web Apps. Use the Share this Site link in the Getting Started section to provide secure access to internal or external users to your SharePoint Online site.

Easily design a professional looking Web site by clicking on the Website tab above.

More about SharePoint Online

FIGURE 1-5 To edit and format your SharePoint pages, you'll find what you need on the Editing Tools Format tab.

You can click Site Actions on the left side of the Ribbon to display a list of ways you can modify and interact with your SharePoint site. You'll learn all about customizing, formatting, and sharing your site in Chapter 5, "Creating Your Team Site with SharePoint Online."

Real-Time Connection with Microsoft Lync

So we've talked about using Outlook to handle your email and scheduling needs and using the SharePoint team site to keep everybody on the same page—what about those times you need to communicate in real time, using instant messaging or online meetings? Enter Microsoft Lync 2010. Microsoft Lync is an exciting addition to this suite of online services, enabling you to keep in touch with all your contacts and make calls, set up meetings, and send ideas and messages on the fly.

When you first log in to Office 365, you might need to download Microsoft Lync by clicking the Install Microsoft Lync link on the control panel page. The process is pretty painless. You'll find the steps in Chapter 2, "Getting Started with Microsoft Lync."

The Microsoft Lync window resembles Windows Live Messenger, but you'll find that it includes a different set of tools. (See Figure 1-6.) Adding new contacts is something done by the administrator so that everyone on the team is using the same address book. (As an administrator, however, you can change that setting so that individuals can add the contacts they'd like to include.) You can call a contact by clicking the Call button to the right of the contact name and choosing the command you want from the displayed list.

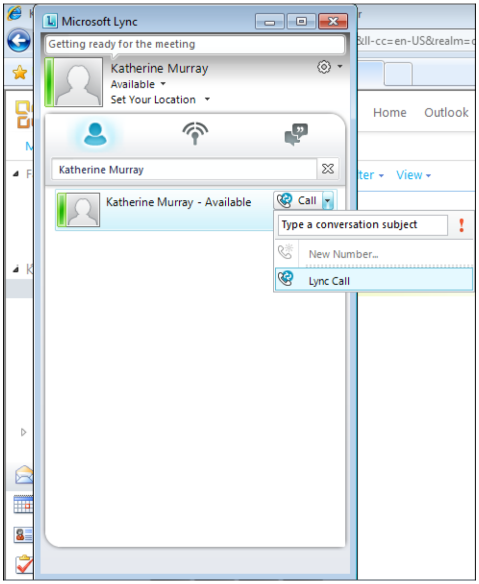

Microsoft Lync
Getting ready for the meeting
Katherine Murray
Available
Set Your Location
Katherine Murray
Katherine Murray - Available
Call
Type a conversation subject
New Number...
Lync Call
&ll-cc=en-US&realm=
Home
Outlook
View

FIGURE 1-6 Microsoft Lync includes the tools you need to make instant calls and set up online meetings.

With Microsoft Lync, you can make instant contact with others, make Internet calls, share audio and video, and host online meetings. You'll find out how to use the various features in Microsoft Lync in Chapter 11, "Talking It Over with Microsoft Lync."

Work with Office Web Apps

Office Web Apps make it super simple for you to save your Office 2010 files online, where you can easily access them from your PC, browser, or phone. If you plan to download, deploy, and license Office 2010 Professional Plus with the pay-as-you-go option, you can use the Install Your Office 2010 Professional Plus subscription link on the Home page to download the software and sync it with Office 365.

This subscription solution is a great way to ensure that you have the latest updates on the Office 2010 software you use. Additionally, you don't need to have a big IT team to handle the deployment for you, and you can get help 24 hours a day, 7 days a week and even make tech support calls as part of the deal. What's more, you can use the Office 2010 applications on your desktop, in your browser, or via your smartphone; save them to your SharePoint libraries; or share them with others on your team through email, by instant message, or in a meeting.

What's Next

This chapter explored the ways our work world is changing and showed that the time is ripe for cloud computing. Whether you plan to use the cloud yourself—to trade files and access documents from home, from work, and on the road—or you need to create, manage, and lead a team, this chapter gave you a sense of the big picture in Office 365. The next chapter shows you how to create an Office 365 account and set up a profile, and it shows you how easy it is to accomplish specific business tasks in Office 365 so that you can begin planning just what you want to do with the tools.

CHAPTER 2

Getting Started with Office 365

IN THIS CHAPTER:

- Creating Your Office 365 Account
- A Look Around the Office 365 Home Page
- Setting Up a Profile
- How Does All This Work?
- What's Your Service? Different Setups, Different Services
- Getting Ready to Use Office 365
- How Office 365 Meets Small Business Needs

BY NOW, YOU'RE an old pro at creating a new account and setting up an online profile, right? You create accounts all the time and are very familiar with the process of posting your information—just what you want others to see—in the public profile portions of your accounts. In this way, Office 365 is similar to other sites that want to get you up and running as smoothly as possible. You'll set up some of the basics of your account—user name, password, type of account, and so forth—and then begin building on those basics to create the kind of online cloud experience you want to have and share with others.

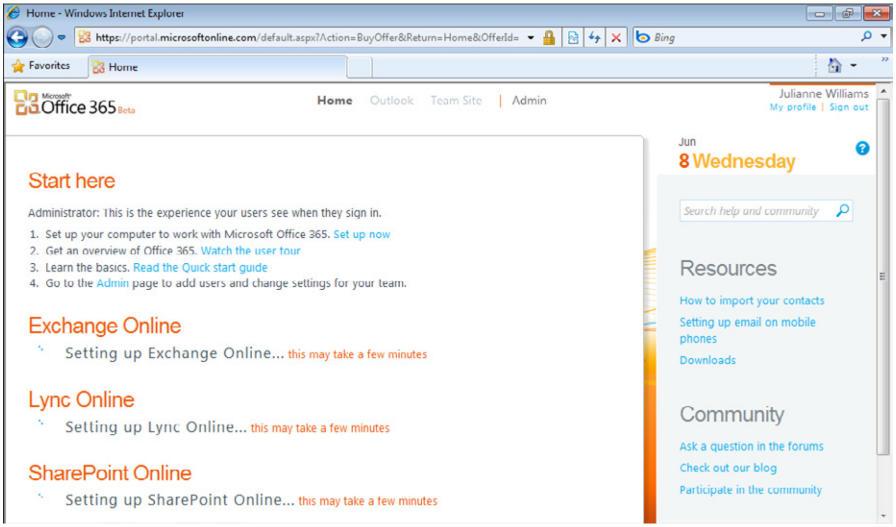
Businesses of all sizes—with teams of all configurations, working from all locations—will find that Office 365 makes connecting, sharing information, and collaborating on projects easy and intuitive. Because you already know the programs—all the Office 2010 favorites—you won't have a big learning curve. And with its 99.9 percent uptime guarantee, Microsoft promises the site will be working round the clock—whether or not you have the IT staff to support it.

So, whether you find this exciting or not, it all begins here. Fortunately for you, Microsoft makes the whole process pretty painless. This chapter shows you how to create your account, set up your profile, and envision the services you want to make available for your team in Office 365.

Creating Your Office 365 Account

The first step in accessing the wonders behind the Office 365 curtain involves creating your own account. Begin by going to *www.office365.com* to sign up. The first question Office 365 will ask you is to decide whether you want to use the Small Business version or the Enterprise version of Office 365. This book focuses on the features you'll find in the Small Business version, which gives you everything you need for creating a team site, sharing documents, working with email and instant messaging, hosting online meetings, and more. The Enterprise version is designed for larger organizations that have sophisticated data needs and require advanced archiving and Active Directory capabilities.

After you choose Small Business, Office 365 presents you with a simple form to fill out. You provide your name and Windows Live ID (and you can sign up for one during this process if you don't already have one), and then you pass muster by typing the validation key and clicking OK. When you click Continue, Office 365 lets you know that it will send your new user name and password to the email address you specified. The Office 365 home page then appears, and one by one the various services that are part of Office 365 begin to load. (See Figure 2-1.)


Home - Windows Internet Explorer
https://portal.microsoftonline.com/default.aspx?Action=BuyOffer&Return=Home&OfferId=
Bing
Favorites
Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Julianne Williams
My profile | Sign out
Jun
8 Wednesday
Search help and community
Resources
How to import your contacts
Setting up email on mobile phones
Downloads
Community
Ask a question in the forums
Check out our blog
Participate in the community

Start here

Administrator: This is the experience your users see when they sign in.

1. Set up your computer to work with Microsoft Office 365. Set up now
2. Get an overview of Office 365. Watch the user tour
3. Learn the basics. Read the Quick start guide
4. Go to the Admin page to add users and change settings for your team.

Exchange Online

Setting up Exchange Online... this may take a few minutes

Lync Online

Setting up Lync Online... this may take a few minutes

SharePoint Online

Setting up SharePoint Online... this may take a few minutes

FIGURE 2-1 After you sign up for Office 365, the program begins to load your software services.

Tip

WHAT'S A MICROSOFT ONLINE SERVICES ID, ANYWAY?

When you first visit *www.Office365.com*, you might think the site is asking for your Windows Live ID. However, if you try to sign in using that tried-and-true user name and password, you'll get a rather unfriendly message: *You are now required to sign in at Live.com* or *You are now required to sign in at MSN*. What does that mean, and how does it get you into Office 365?

The answer to the mystery is that your Microsoft Online Services ID and your Windows Live ID are two different things. To keep Office 365 secure (and paid for), site security is enforced by admitting only licensed users into the site. This means that the administrator of your Office 365 site needs to generate your Microsoft Online Services ID and password, and that's done through the Microsoft Online Office Subscription website. If you don't have a Microsoft Online Services ID, contact your administrator to get your ID and password so that you can get into your group's Office 365 site.

You'll notice also that whatever name you select, Microsoft adds "onmicrosoft.com" to the name you've chosen for your Office 365 account. You'll also find that the URL for the public-facing website that is part of your account has "sharepoint.com" appended to it. These name additions won't cause you any problem, but make a note of them so that you remember how to get into your team site and find your website easily later.

A Look Around the Office 365 Home Page

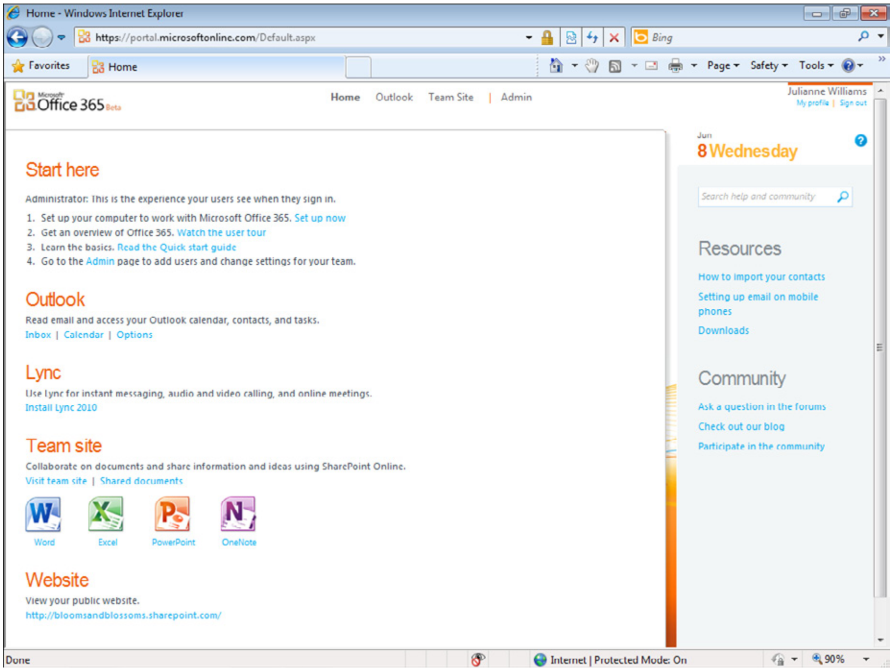
After you enter the necessary Microsoft Online Services ID (or create a new account), you are presented with the Office 365 Home page. The Office 365 Home page has a minimalist design, offering you primary site choices across the top (Home, Outlook, and Team Site—plus Administrator if you're, well, the administrator). As Figure 2-2 shows, on the left side of the screen, you see categories that introduce you to the overall process and then to each of the primary Office 365 services:

- **Start here** walks new users through the simple tasks involved in setting up Office 365 for everyday use. New users learn how to set up their computers, and learn about the basics of Office 365. Users who will serve as administrators for the site can go to the Admin page and add new users to the account.
- **Outlook** is short for Outlook Web App, the familiar web version of Office 2010. You can use Outlook to check and send email, schedule appointments and tasks, and set up email and calendar options.

- **Lync** contains the settings you configure to send instant messages, set up online meetings, and share audio and video clips with others on your team using Microsoft Lync.
- **Team site** contains all the options you need to create a team site with Microsoft SharePoint. You can access your team site, view documents you're sharing with others, or create a new Word document, Excel worksheet, PowerPoint presentation, or OneNote notebook.

> Clicking each one of the Office 365 icons launches a different Office Web App—Word, Excel, PowerPoint, or OneNote—and opens a new document. (You'll learn more about working with Office 365 Web Apps in Chapter 8, "Working with Office 2010 Web Apps.")

- **Website** lists the link to your public website, which you can easily modify with the content, pages, and pictures you want the public to see.


Home - Windows Internet Explorer
https://portal.microsoftonline.com/Default.aspx
Bing
Favorites
Home
Page
Safety
Tools
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Julianne Williams
My profile | Sign out
Jun
8 Wednesday
Search help and community
Resources
How to import your contacts
Setting up email on mobile phones
Downloads
Community
Ask a question in the forums
Check out our blog
Participate in the community
Word
Excel
PowerPoint
OneNote
Done
Internet | Protected Mode: On
90%

Start here

Administrator: This is the experience your users see when they sign in.

1. Set up your computer to work with Microsoft Office 365. Set up now
2. Get an overview of Office 365. Watch the user tour
3. Learn the basics. Read the Quick start guide
4. Go to the Admin page to add users and change settings for your team.

Outlook

Read email and access your Outlook calendar, contacts, and tasks.
Inbox | Calendar | Options

Lync

Use Lync for instant messaging, audio and video calling, and online meetings.
Install Lync 2010

Team site

Collaborate on documents and share information and ideas using SharePoint Online.
Visit team site | Shared documents

Website

View your public website.
http://bloomsandblossoms.sharepoint.com/

FIGURE 2-2 The Office 365 Home page gives you the links you need to access your mail and manage your calendar, connect with your team in real time, and work on your Office documents.

CHECKING OUT YOUR RESOURCES

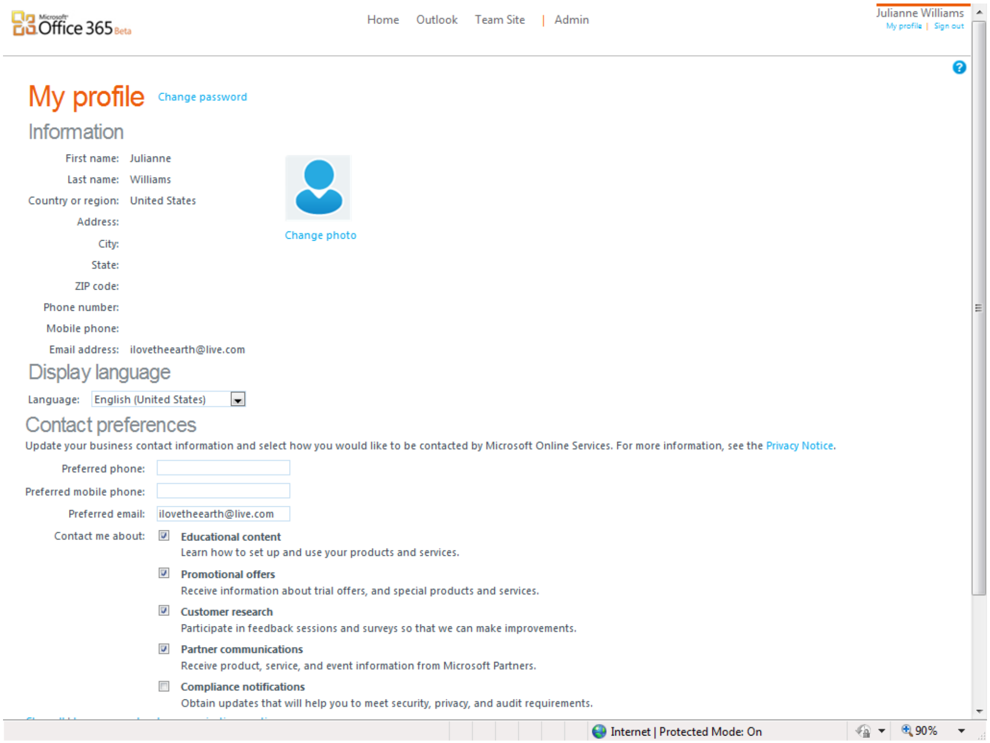
On the right side of the Office 365 home page, you'll see the Resources column, which includes links to more information that can help you get started using Office 365. At the top of the column, you see a search box, which you can use to locate help content on any topic related to Office 365. Just click in the box, type a word or phrase that describes the type of information you'd like to find, and click Search. A pop-up window gives you a list of search results with links to the information you're looking for. You can return to Office 365 by simply clicking the close box.

Back on the Office 365 Home page, the top article in the Resources area shows you how to import your contacts to your Outlook Web App address book. You can also find out how to set up your smartphone to receive your Office 365 mail (which you'll learn more about later in this chapter), and you can click the Downloads link to install additional Office 365 services.

At the bottom of the Resources column, you'll see a set of Community links that display ways you can interact with other Office 365 users. You can ask a question in one of the Office 365 forums, read the Office 365 blog, or add your own thoughts and content to the forum, wiki, or other community efforts.

Setting Up a Profile

Your first task, after you create your Office 365 account, is to tell the program a little about your preferences and interests. Your profile—similar to ones you've probably created on social media sites—lists the basics about who you are, where you live, and what language you use. There's nothing fancy or too involved here, as you can see from Figure 2-3. Note, however, that the basic info about you—your name and address, for example—aren't editable in the profile screen. That's because the Administrator of your account is the one responsible for making changes to user accounts. You learn how to set up and edit user account info in Chapter 3, "Administering an Office 365 Account."



My profile Change password

Information

First name: Julianne
Last name: Williams
Country or region: United States
Address:
City:
State:
ZIP code:
Phone number:
Mobile phone:
Email address: ilovetheearth@live.com

Display language

Language: English (United States)

Contact preferences

Update your business contact information and select how you would like to be contacted by Microsoft Online Services. For more information, see the Privacy Notice.

Preferred phone:
Preferred mobile phone:
Preferred email: ilovetheearth@live.com
Contact me about:

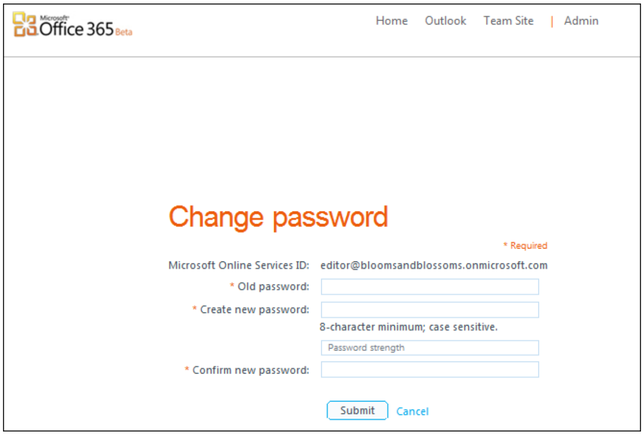
- ☑ **Educational content**
  Learn how to set up and use your products and services.
- ☑ **Promotional offers**
  Receive information about trial offers, and special products and services.
- ☑ **Customer research**
  Participate in feedback sessions and surveys so that we can make improvements.
- ☑ **Partner communications**
  Receive product, service, and event information from Microsoft Partners.
- ☐ **Compliance notifications**
  Obtain updates that will help you to meet security, privacy, and audit requirements.

FIGURE 2-3 Configuring your profile.

Changing Your Password

If your Office 365 account was created for you—which means that instead of you signing up for the service and entering the password you want to use to access your account, an administrator did this for you—you will have received an autogenerated password that you'll most likely want to change when you log in to Office 365. Here's how to do that:

1. Click My Profile.
2. Click Change Password.
3. If prompted, sign in again using your user name and password; then click Close.
4. In the Change Password window, type your old password. (See Figure 2-4.)
5. Click in the Create New Password box, and type a new password for your account.
6. Type the new password a second time.
7. Click Submit.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
* Old password:
* Create new password:
Password strength
* Confirm new password:
Submit
Cancel

Change password

* Required

Microsoft Online Services ID: editor@bloomsandblossoms.onmicrosoft.com

8-character minimum; case sensitive.

FIGURE 2-4 You can change your password in your profile page.

WHAT MAKES A GOOD PASSWORD?

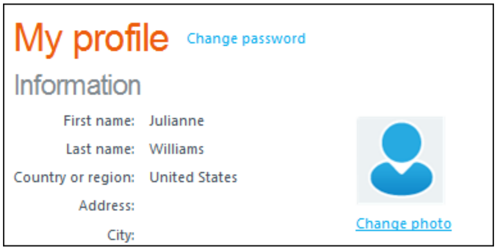
Your password for Office 365 needs to be at least eight characters in length. To increase the strength of the password—which decreases the risk that your password will be deciphered by someone else—use a variety of uppercase and lowercase letters, numbers, and special characters.

The Password Strength bar shows you how strong the password you’re suggesting will be; you can revise the password as needed to make it as strong as possible.

Changing Your Profile Picture

Office 365 also gives you the option of adding your own photo to your profile so that others will be able to see your image—or your favorite character, animal, or place—in various places on Office 365. To change the profile picture, follow these steps:

1. On your profile page, click Change Photo. (See Figure 2-5.)
2. Click Browse, and navigate to the folder containing the picture you’d like to use.
3. Click the picture, and click Open.
4. Click Upload. (See Figure 2-6.)



Information

First name: Julianne

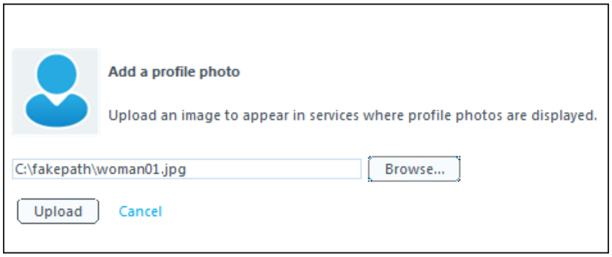
Last name: Williams

Country or region: United States

Address:

City:

FIGURE 2-5 Click Change Photo to begin the process of changing your profile picture.



Add a profile photo

Upload an image to appear in services where profile photos are displayed.

C:\fakepath\woman01.jpg

FIGURE 2-6 Click Browse, and navigate to the folder containing the picture you want to use.

The new photo appears in your profile photo. You can change the photo at any point by repeating steps 1 through 4 and choosing a new photo.

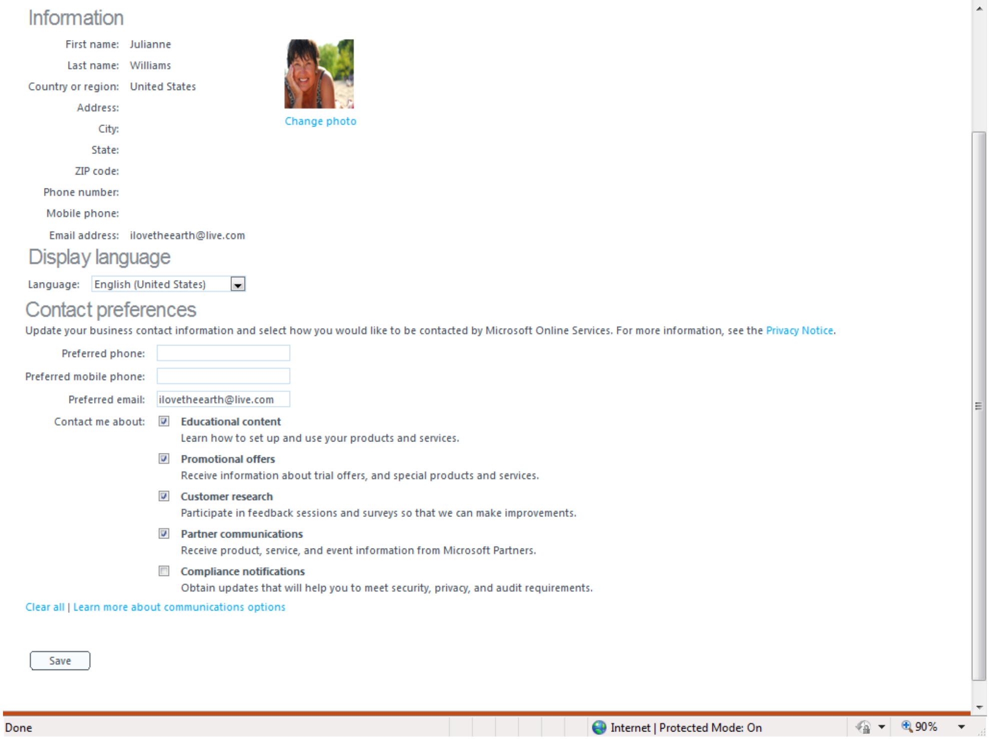
Setting Office 365 Preferences

You can also change some of your preferences by scrolling to the bottom portion of the screen, where the items you can change are located. (See Figure 2-7.) You can change the language in which Office 365 is displayed, enter your phone numbers, update your email address, and sign up to receive more information on various topics related to Office 365.

If you want to change the display language, click the Language arrow and choose the language you want to use. In Contact Preferences, enter your Preferred Phone and Preferred Mobile Phone numbers if you like. You can also change your Preferred Email by clicking in the box and typing a new email address.

In the Contact Me About area, you can indicate which (if any) of the topics interest you enough that you'd like to receive more information about the products and services listed. To remove yourself from any of the topics, click to clear the checkmarks or click the Clear All link at the bottom of the list.

To save all the changes on your profile, click the Save button at the bottom of the page. You can then return to the office 365 Home page by clicking Home at the top of the Office 365 window.



Information

First name: Julianne
Last name: Williams
Country or region: United States
Address:
City:
State:
ZIP code:
Phone number:
Mobile phone:
Email address: ilovetheearth@live.com

Display language

Language: English (United States)

Contact preferences

Update your business contact information and select how you would like to be contacted by Microsoft Online Services. For more information, see the Privacy Notice.

Preferred phone:
Preferred mobile phone:
Preferred email: ilovetheearth@live.com

Contact me about:
- ☑ **Educational content**
  Learn how to set up and use your products and services.
- ☑ **Promotional offers**
  Receive information about trial offers, and special products and services.
- ☑ **Customer research**
  Participate in feedback sessions and surveys so that we can make improvements.
- ☑ **Partner communications**
  Receive product, service, and event information from Microsoft Partners.
- ☐ **Compliance notifications**
  Obtain updates that will help you to meet security, privacy, and audit requirements.

Clear all | Learn more about communications options
Save
Done
Internet | Protected Mode: On
90%

FIGURE 2-7 Save your profile changes by clicking Save at the bottom of the profile page.

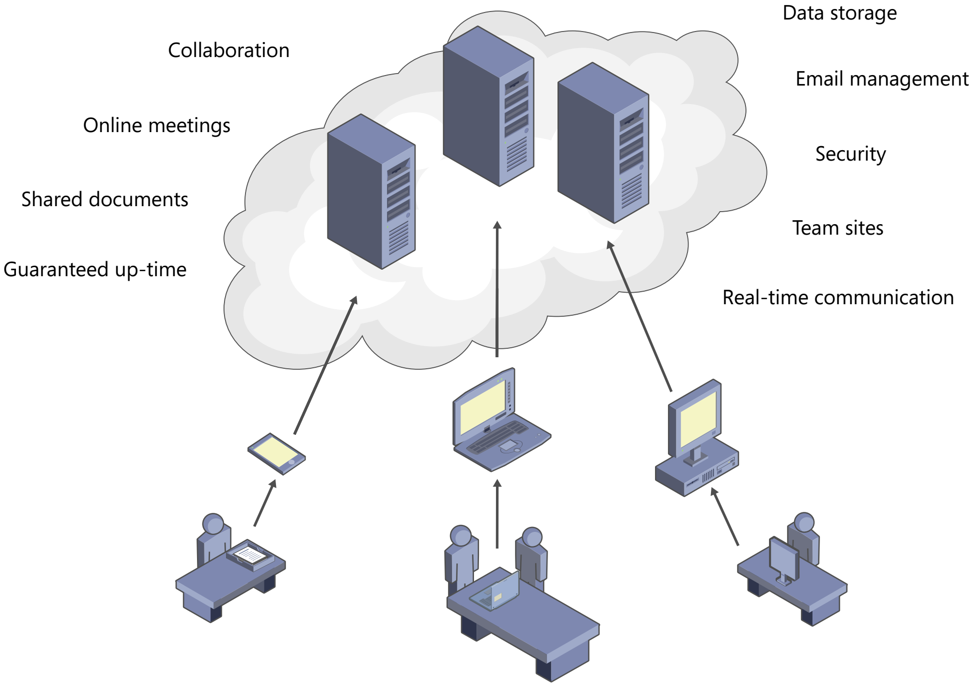
Tip

How Does All This Work?

Getting your mind around all this cloud possibility—especially when a number of configurations are available—might feel like a lot to try to imagine all at once. *Cloud services* are called that because the software and data centers appear when you need them and vaporize when you don't, like clouds—in other words, the resources you need to use applications, store data, and enable teams to connect are there when you need them and used elsewhere when you don't.

This enables businesses of all sizes to get access to the programs and services they need through a web-based service model. And it means that small businesses—who have the need for reliable technology but might not have a robust IT staff to support it—can benefit by having guaranteed access to technology that is hosted, supported, and deployed from the service provider (in this case, Microsoft Online Services). And the icing on the cake is that the cloud approach is better for the environment because data centers share resources and services, which also reduces the systems and servers your own company needs to have to support the work you do.

When you think of all the different services required to keep your business or team running efficiently and effectively and put them in a cloud, the whole configuration might look something like this simplified diagram:



What's Your Service? Different Setups, Different Services

Office 365 is available in three different versions that are designed to give you just what you need—no more, and no less. Here's the quick rundown:

- **Office 365 for Small Business** (which is the focus of this book) includes access to Office Web Apps, up to 50 user accounts, a 25-GB mailbox for each user, mobile support, the ability to stay in touch with instant messaging, presence technology, audio and video, and team sites with SharePoint Online. The subscription cost for Office 365 for Small Business is $6 per user.
- **Office 365 Enterprise** includes all the features of Small Business as well as the full Office Professional Desktop software and pay-as-you-go pricing options. Enterprise users can also add kiosk plans that offer access to email, documents, and team sites in Office 365. Enterprise users can choose from two different subscriptions: existing Business Productivity Online Suite (BPOS) customers pay $10 per month; enterprise users who want to purchase the pay-as-you-go Microsoft Office Professional Plus 2010 service pay $24 per month.
- **Office 365 for Education** provides students with access to the Office 365 services—Office Web Apps, instant messaging, audio and video, and team sites—plus the latest version of Microsoft Live@edu, an online community of thousands of schools. Pricing for Office 365 for Education is $10 for educators and staff; the service is free for students.

IS OFFICE 365 THE NEW OFFICE LIVE SMALL BUSINESS?

In a word, yes. If you previously used Office Live Small Business (OLSB) for web creation and hosting, email, marketing, and more, you might be wondering how that service might overlap with Office 365. Office 365 includes all the greatest features of Office Live Small Business, and in late 2011 or early 2012, Microsoft plans to offer existing OLSB users a free transition to Office 365 for three months. After the initial free period, you can continue with your Office 365 for Small Business account for only $6 a month.

Getting Ready to Use Office 365

After you set up and log in to your Office 365 account, you need to do a few more things to get all the services ready to use. Specifically, you need to

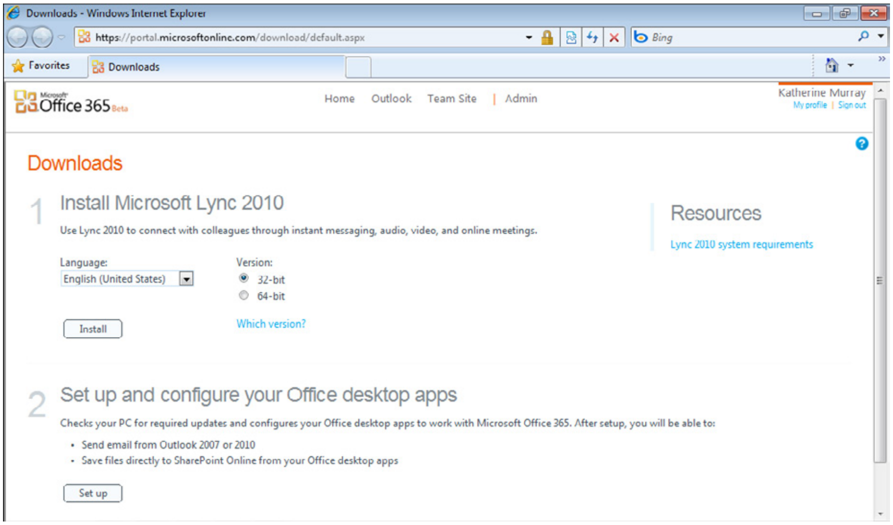
- Download and install Microsoft Lync so that you can use instant messaging to contact others on your team, share audio and video, and hold online meetings.
- Get ready to use your existing Office programs.
- Set up your mobile phone to work with Office 365.

This section walks you through those tasks so that you can begin to arrange your cloud experience just the way you want it.

Installing Microsoft Lync

Microsoft Lync 2010 is the service that enables you to send instant messages to any member of your team who is available for contact. You can see the online presence of team members, share audio and video files, and schedule online meetings, phone calls, and more. Lync Online is the utility that connects your team in real time, whether you have something important to discuss or just want to ask somebody a quick question.

Begin the process of downloading and installing Microsoft Lync by clicking Install Lync 2010 in the Lync category of the Office 365 Home page. On the Downloads page (shown in Figure 2-8), choose your version (32-bit or 64-bit) and click Install.


Downloads - Windows Internet Explorer
https://portal.microsoftonline.com/download/default.aspx
Bing
Favorites
Downloads
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile
Sign out
Resources
Lync 2010 system requirements
Install
Which version?
Set up

Downloads

1 Install Microsoft Lync 2010

Use Lync 2010 to connect with colleagues through instant messaging, audio, video, and online meetings.

Language: English (United States)

Version: ● 32-bit ○ 64-bit

2 Set up and configure your Office desktop apps

Checks your PC for required updates and configures your Office desktop apps to work with Microsoft Office 365. After setup, you will be able to:

- Send email from Outlook 2007 or 2010
- Save files directly to SharePoint Online from your Office desktop apps

FIGURE 2-8 Install Microsoft Lync 2010 to add instant messaging, presence, audio, and video to your Office 365 capabilities.

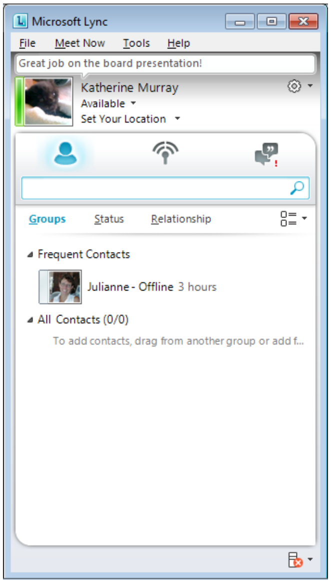
Tip

After you click Install, the File Download – Security Warning dialog box appears so that you can choose whether you want to run or save the Lync install file. It's OK to go ahead and run the installation utility directly from Office 365 (unless your business has a policy to the contrary—in which case, you can click Save and save the file to your desktop, where you can launch it after downloading by double-clicking it).

It will take a few minutes for Lync to download; then you might be prompted to restart your computer. (Not all computer installations require this, however.) If prompted, restart your system normally, and Microsoft Lync 2010 should start automatically. If it doesn't, follow these steps to launch Lync 2010:

1. Click Start.
2. Click All Programs.
3. Click the Microsoft Lync folder.
4. Choose Microsoft Lync 2010 to start the program.

After Lync launches, it displays the window shown in Figure 2-9. As you can see, it resembles an instant messaging client such as Windows Live Messenger. There's one big difference, though—where are your contacts? Because Office 365 is built to be secure and enable your work with your team, only team members who are part of your Office 365 group appear in your Lync window, unless you use Lync for logging on to other domains as well. Within Office 365, your administrator is the one who adds user roles and permissions so that others will appear in your Lync window, ready for contact. You'll find out more about setting up user accounts in Chapter 3.



Great job on the board presentation!

Katherine Murray
Available
Set Your Location

Frequent Contacts
Julianne - Offline 3 hours
All Contacts (0/0)
To add contacts, drag from another group or add f...

FIGURE 2-9 Microsoft Lync enables you to reach your colleagues instantly and set up online meetings.

You'll find all kinds of step-by-step procedures for using Microsoft Lync 2010 in Chapter 11, "Talking It Over with Microsoft Lync."

HARDWARE REQUIREMENTS FOR HAPPY LYNCING

One thing you'll notice throughout Office 365 is that the services are designed to be flexible. Almost nothing about this program is a one-size-fits-all answer. And that springs directly from the idea of the cloud—use what you need, and leave the rest for somebody else to use. Toward that end, the hardware requirements you need to run Lync 2010 depend on what you plan to do with the software. Understandably, sharing video or hosting online meetings in real time requires more bandwidth and processing power than simply sharing data or making a phone call now and then. The following list shows you the recommended hardware requirements so that you can see whether your system has what it takes to Lync successfully:

- **Display** Super VGA 800x600 [recommended: Super VGA 1024x768 or higher]
- **Operating system** Windows 7 or Windows Vista 32-bit, (64-bit for the 64-bit version of Lync); Windows XP SP2, or Windows 2000 Professional SP4

- **Microprocessing power** For just data and voice: Intel Pentium 500 MHz or higher; For video: 1 GHz or higher; For online meetings 1.8 GHz or higher
- **Memory** 512 MB RAM
- **Hard-disk space** 1.5 MB
- **Video card memory** 64 MB RAM
- **Audio** Microphone and speakers, or headset with microphone
- **Video** Video camera or webcam
- **Bandwidth** For data only: 56 kbps (kilobyte per second); For data, voice, video, and online meetings: 350 kbps

Tip

Getting Ready to Use Office 2010

Office 365 offers you different ways to work with the Microsoft Office 2010 applications, depending on what you need to do with the various programs. As part of Microsoft Office 2010, you can access and work with Office Web Apps:

- Word Web App
- Excel Web App
- PowerPoint Web App
- OneNote Web App

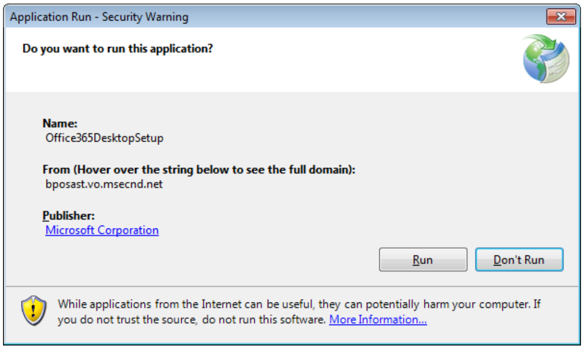
Additionally, Outlook Web App enables you to receive and send email, set up meetings, assign tasks, and perform the most common tasks you use in your desktop version of Outlook 2010.

Office Web Apps are available to you as part of Office 365 no matter which version you are using. These Web Apps are great for creating, editing, sharing, and reviewing content. What's more, you can work collaboratively on documents with Word Web App, partner on presentations with PowerPoint Web App, and co-edit in the same worksheet with Excel Web App. You'll find out more about the capabilities of the Web apps—and get the play-by-play on how to accomplish different tasks—in Chapter 8.

Tip

Running Office 365 Desktop Setup

You can set up your desktop Office 2010 applications to work seamlessly with Office 365 by clicking Downloads in the Resources area on the right side of the Office 365 Home page, which takes you to the Downloads page. Click the Set Up button in the Set Up And Configure Your Office Desktop Apps area. Click Run (shown in Figure 2-10) to install and run the utility.



Do you want to run this application?

Name:
Office365DesktopSetup

From (Hover over the string below to see the full domain):
bposast.vo.msecnd.net

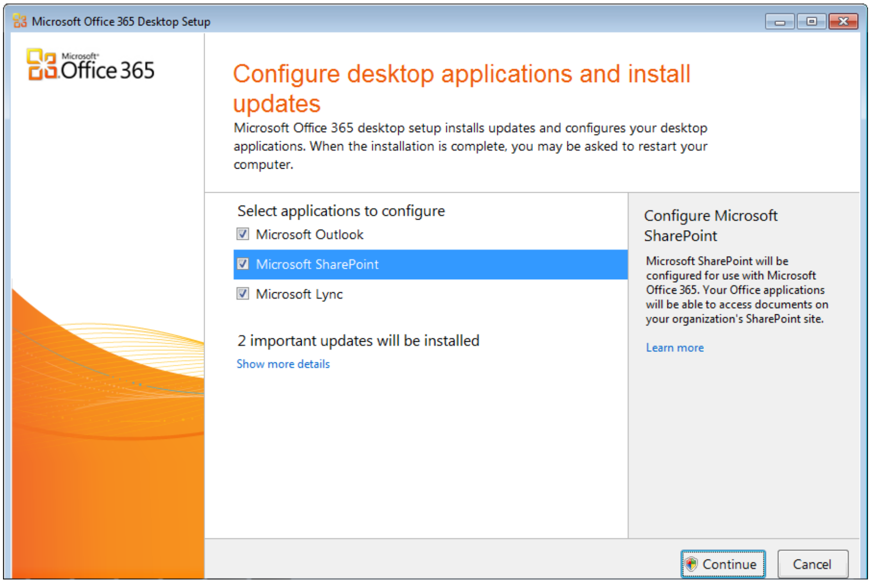
Publisher:
Microsoft Corporation

While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not run this software. More Information...

FIGURE 2-10 The Office 365 Desktop Setup utility connects Office Web Apps to your Office 2010 desktop applications.

After you run the Office 365 Desktop Setup utility, you'll be able to open and work with files from Office 365 in your Office 2010 applications. You'll also be able to sign in to your Office 365 account by using your Microsoft Online Services ID directly in your Office 2010 programs. So it's a convenience issue, but it also enables you to smooth out any wrinkles your desktop applications might encounter when you go to save or access files you've saved in Office 365.

In the Microsoft Office 365 Desktop Setup dialog box, click Continue to set up your applications and download any necessary program updates. (See Figure 2-11.) Click Continue. You will be asked to review and access the Office 365 user agreement, and then the utility begins searching for and downloading any available updates.



Configure desktop applications and install updates

Microsoft Office 365 desktop setup installs updates and configures your desktop applications. When the installation is complete, you may be asked to restart your computer.

Select applications to configure

☑ Microsoft Outlook
☑ Microsoft SharePoint
☑ Microsoft Lync

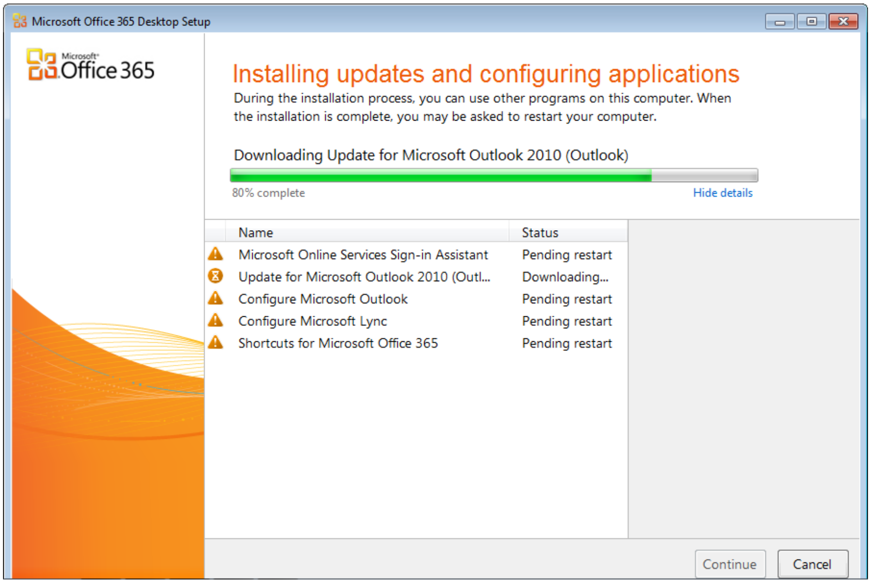
2 important updates will be installed

Configure Microsoft SharePoint

Microsoft SharePoint will be configured for use with Microsoft Office 365. Your Office applications will be able to access documents on your organization's SharePoint site.

FIGURE 2-11 The Office 365 Desktop Setup utility configures the applications and downloads any available updates for your programs.

You can get more information about what's being downloaded by clicking the Show More Details link toward the right end of the status bar. The program items being updated are listed in the center column of the dialog box, and the link wording changes to Hide Details. (See Figure 2-12.) When the process is finished, click the Restart Now button to close all applications and reboot your computer so that the changes can take effect.



Installing updates and configuring applications

During the installation process, you can use other programs on this computer. When the installation is complete, you may be asked to restart your computer.

Downloading Update for Microsoft Outlook 2010 (Outlook)

80% complete

Name	Status
Microsoft Online Services Sign-in Assistant	Pending restart
Update for Microsoft Outlook 2010 (Outl...	Downloading...
Configure Microsoft Outlook	Pending restart
Configure Microsoft Lync	Pending restart
Shortcuts for Microsoft Office 365	Pending restart

FIGURE 2-12 You can view the changes being made by clicking Show More Details and reviewing the list of updates in the center of the dialog box.

Setting Up Outlook 2010

When all is said and done, your computer restarts and pops back up with one more configuration screen, most likely telling you that a little manual work is required on your part. You need to create an email account in your desktop version of Outlook so that the Office 2010 Outlook Web App can interact seamlessly with your desktop version of the program. The process is simple:

1. Open Outlook 2010.
2. Click on the File tab, and click Add Account.
3. Outlook might add your information automatically in the Auto Account Setup page. Change the entries if necessary, and click Next.

Tip

4. Outlook searches for your Exchange Online settings and prompts you to enter your email address and your use name.
5. Click Finish to complete the process.

If you have trouble setting up your Office 365 email in Outlook 2010, return to your Office 365 account and type the phrase Connect Outlook to this account to find more help on this topic.

Now your desktop versions of Office 2010 applications are ready to work with your Office 365 account. You'll find out more about this—and all the related how-to tasks—in Chapter 6, "Posting, Sharing, and Managing Files."

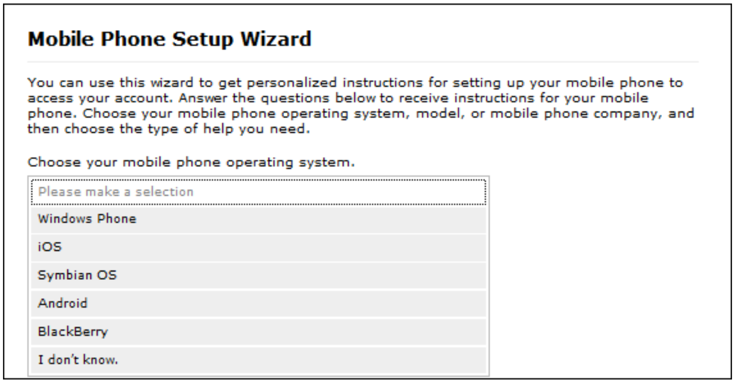
Setting Up Your Mobile Phone

Ah, now we get to the fun part. Who wants to be stuck at a desk all day working on some ho-hum report or trying to get some worksheet numbers to balance? Why not do it at the coffee shop, on the train, or while you're waiting for the movie to begin? You can set up your mobile device to access and work with Office 365 data in a number of ways. After you connect your phone, you can check and send email, check your calendar, schedule appointments, and update your contacts information. You can also use Office 2010 Mobile Apps—for Word, Excel, PowerPoint, and OneNote—to carry on the work you started in Office 365.

To set up your mobile phone to work with Office 365, follow these steps:

1. On your Office 365 Home page, click Setting Up Email on Mobile Phones in the Resources column on the right side of the window.
2. In the window that appears, click Mobile Phone Setup Wizard.
3. Begin by clicking the arrow and choosing your mobile phone operating system. (See Figure 2-13.)
4. Finally, choose what you want to be able to do with your phone.

The options displayed in the What Would You Like To Do? list depend on the capabilities of the phone you selected and also on the account type you have with Office 365. For example, if you chose Windows Phone as your mobile operating system, your choices are Set Up Microsoft Exchange Email On Your Windows Phone and Set Up POP Or IMAP Email On Your Windows Phone. However, if you choose a BlackBerry device, your only choice is Set Up POP Or IMAP Email On A G1.



Mobile Phone Setup Wizard

You can use this wizard to get personalized instructions for setting up your mobile phone to access your account. Answer the questions below to receive instructions for your mobile phone. Choose your mobile phone operating system, model, or mobile phone company, and then choose the type of help you need.

Choose your mobile phone operating system.

FIGURE 2-13 Begin by choosing your service provider in the Mobile Phone Setup Wizard.

Setting Up POP and IMAP Email

If you want to check your Office 365 email by using a POP or IMAP email account (which is the default if you don't use Microsoft Exchange), you can easily set up the account on your phone by following these steps (note that these instructions were written for the Windows 7 HTC HD 7 and might change slightly for different phones):

1. On your phone, tap Settings.
2. Tap Email & Accounts.
3. Tap Add An Account, and tap Other Account.
4. Enter your Office 365 email address and password.
5. Click Sign In.

The new account opens, and Windows 7 Mobile checks all your settings. After a moment, the email is synchronized and you will be able to check and send email from your mobile phone.

How Office 365 Meets Small Business Needs

In the chapters that follow, you'll see all sorts of ways you can use the various Office 365 services to collaborate with team members, accomplish tasks, create projects, look up data, and share what you know. The key to all this is flexibility, creativity, and using just what you need. As you log in—from *wherever* you log in—and work with files, messages, sites, and more, you'll discover that you really can get in and out quickly and complete the tasks you want to complete. And you can do all this without the huge overhead of servers, desk space, office rent, and transportation costs. And it's supportable even without a highly trained IT department (because the Office 365 IT group has you covered).

In essence, Office 365 does what many of us have been waiting for a long time. It offers us the worry-free, easy-to-afford, and easy-to-support option of using our software to do what we need to do without having to struggle through all the technical details required to install and maintain it. This section takes a look at how Office 365 might fulfill some of your critical business needs. The idea here is to provide some common examples to spark ideas in your mind and inspire you to try things that work in your unique situation.

The Big Picture: Online and Off

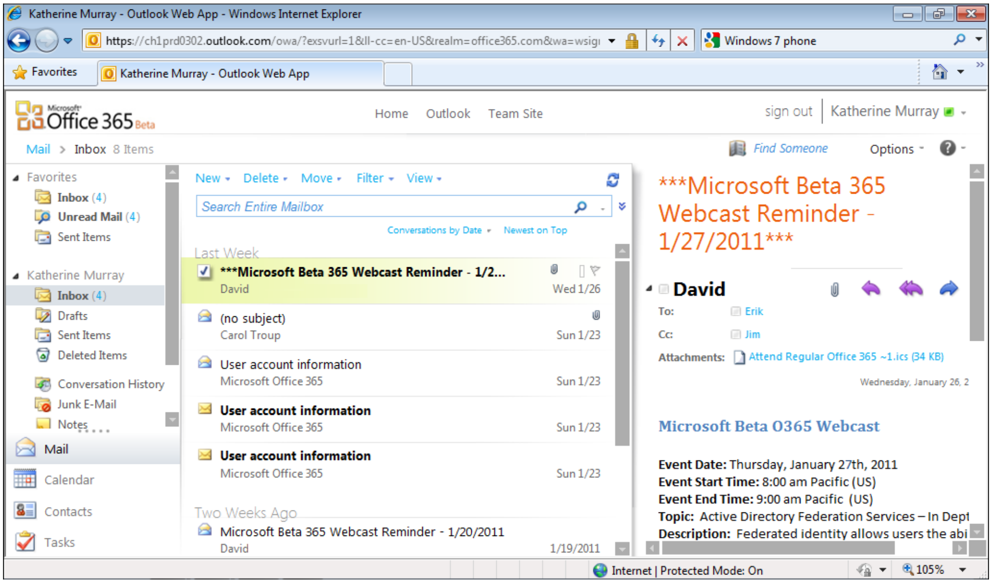
Remember the days when you felt like you had to rush from home to office because you were afraid you were going to miss an important email message? Because email has become a common feature on most phones, that particular anxiety has dissolved for many of us. But often, reading and even responding to email on the phone can be limited. What if you need to look something up in a document you just created? What if another team member has the answer to the question the sender asked? You still need to wait until you get to the office to pull together the information for a satisfactory answer.

Office 365 makes it simple and seamless to stay in touch with your team and your files no matter where you are. You can easily move from your desktop computer to your laptop to your phone or even to a kiosk in the hotel lobby—looking up report information, checking your notes, or sending along a file that a teammate needs to review. You can easily move online and off, knowing that your files are stored in a place you can access them easily on any device that has web access.

Email, Calendars, Meetings, and More

Being able to access and send email is nothing new; chances are that you've been doing it by phone for a while now. But having your email easily connected to your schedule, group calendars, appointments, tasks, and more is a plus that helps you stay organized and synchronized with your team.

In Office 365, you can easily get to your inbox and calendar right from the Home page by clicking the appropriate links under the Outlook category. Outlook Web App enables you to check and compose email, manage contacts, set up meetings, arrange appointments, and create and track tasks, all in a single webpage. (See Figure 2-14.)


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://ch1prd0302.outlook.com/owa/?exsvurl=1&ll-cc=en-US&realm=office365.com&wa=wsig
Windows 7 phone
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 8 Items
Find Someone
Options
Favorites
Inbox (4)
Unread Mail (4)
Sent Items
Katherine Murray
Inbox (4)
Drafts
Sent Items
Deleted Items
Conversation History
Junk E-Mail
Notes
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Last Week
Two Weeks Ago
Internet | Protected Mode: On
105%

***Microsoft Beta 365 Webcast Reminder - 1/2... David Wed 1/26

(no subject) Carol Troup Sun 1/23

User account information Microsoft Office 365 Sun 1/23

User account information Microsoft Office 365 Sun 1/23

User account information Microsoft Office 365 Sun 1/23

Microsoft Beta 365 Webcast Reminder - 1/20/2011 David 1/19/2011

Microsoft Beta 365 Webcast Reminder - 1/27/2011

David

To: Erik

Cc: Jim

Attachments: Attend Regular Office 365 ~1.ics (34 KB)

Wednesday, January 26, 2

Microsoft Beta 0365 Webcast

Event Date: Thursday, January 27th, 2011
Event Start Time: 8:00 am Pacific (US)
Event End Time: 9:00 am Pacific (US)
Topic: Active Directory Federation Services – In Dept
Description: Federated identity allows users the abi

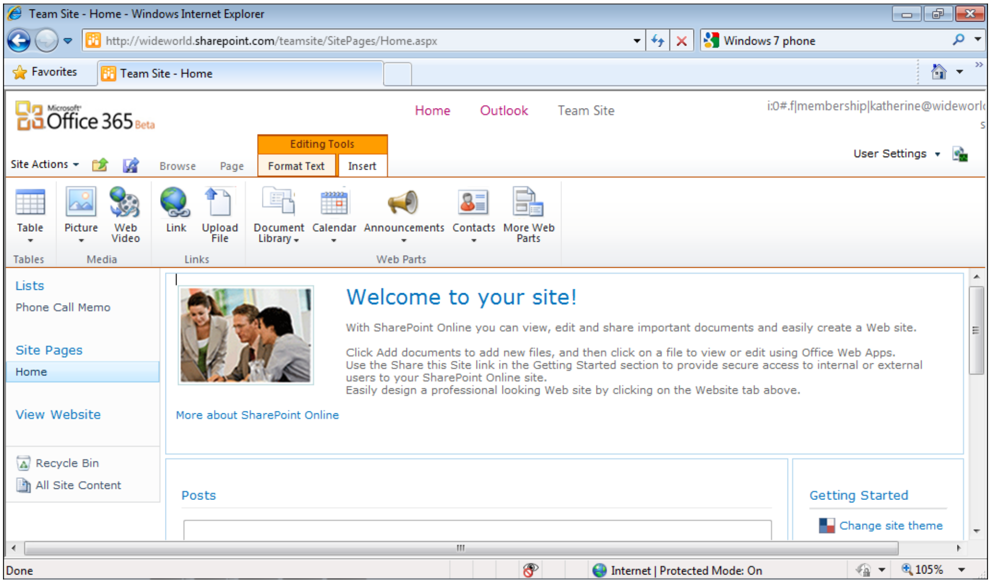
FIGURE 2-14 Outlook Web App makes it easy to access and work with your email, schedule, and contacts, and complete tasks all from a single interface.

Tip

Creating a Team Workspace

One of the challenges of working with a remote team is that there's no common space to share files, gather for meetings, or brainstorm about new ideas. Now Office 365 enables you to create a shared site where you can keep in touch with your team members, create workflows to track your projects, add project resources, schedule meetings, and much more.

The team workspace capability is built on SharePoint Online. As you can see from Figure 2-15, you can customize your team site by adding all sorts of tools, web parts, media, and more. You can also create document libraries so that your team members all have access to the files they need, and you can add pages and content related to the projects you are creating.


Team Site - Home - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/SitePages/Home.aspx
Windows 7 phone
Favorites
Team Site - Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
i:0#.f|membership|katherine@wideworl
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Table
Picture
Web Video
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Web Parts
Lists
Phone Call Memo
Site Pages
Home
View Website
Recycle Bin
All Site Content
Posts
Getting Started
Change site theme
Done
Internet | Protected Mode: On
105%

Welcome to your site!

With SharePoint Online you can view, edit and share important documents and easily create a Web site.

Click Add documents to add new files, and then click on a file to view or edit using Office Web Apps.
Use the Share this Site link in the Getting Started section to provide secure access to internal or external users to your SharePoint Online site.
Easily design a professional looking Web site by clicking on the Website tab above.

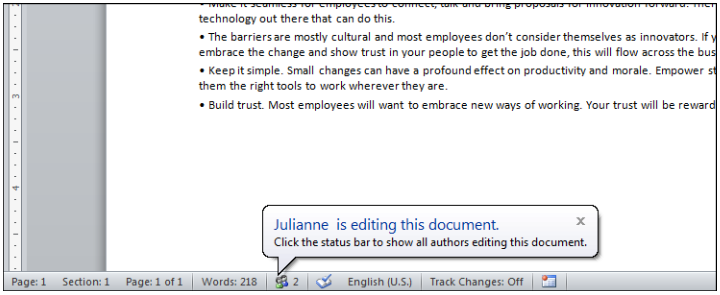
More about SharePoint Online

FIGURE 2-15 Your team site in SharePoint Online enables your team to stay in touch, share documents, schedule events, and much more.

Sharing Documents with Your Team

You can easily open, edit, and share the documents you save in your team site in SharePoint Online. When you choose to work with a file—a Word document, for example—it opens in Word Web App. You can choose to edit the document if you like, which opens the file in your version of Word while still keeping the file on the SharePoint server. You can also choose to edit the file in the Web App if you like.

You can then share the document window with another person on your team if you want to collaborate on the project in real time. When your other colleagues are working with the same file, the Office Web App you are using lets you know. (See Figure 2-16). The program locks areas where others are editing and then syncs all the changes so that the most recent changes to the document are preserved. In this way, you can collaborate on important files without fear of overwriting another team member's changes or losing an important change.



technology out there that can do this.

- The barriers are mostly cultural and most employees don't consider themselves as innovators. If y
embrace the change and show trust in your people to get the job done, this will flow across the bus
- Keep it simple. Small changes can have a profound effect on productivity and morale. Empower st
them the right tools to work wherever they are.
- Build trust. Most employees will want to embrace new ways of working. Your trust will be reward

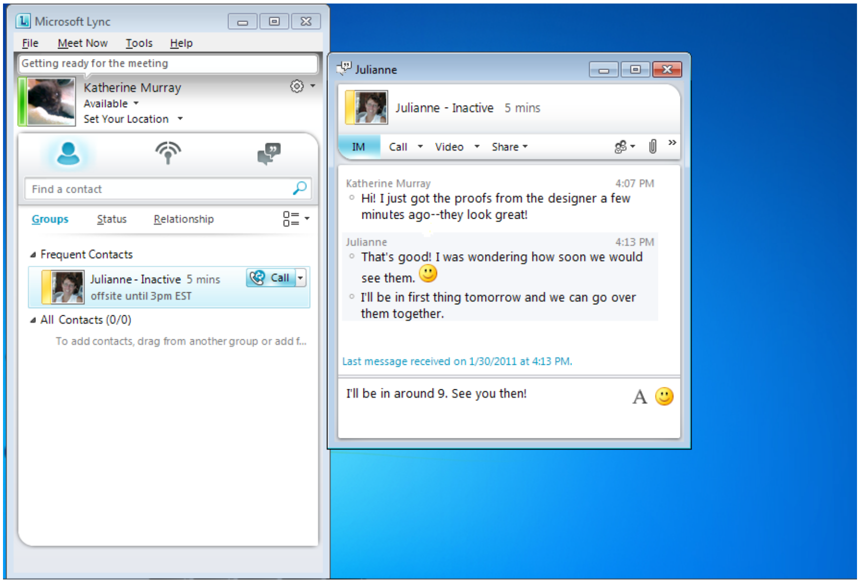
Julianne is editing this document.
Click the status bar to show all authors editing this document.

Page: 1 Section: 1 Page: 1 of 1 Words: 218 2 English (U.S.) Track Changes: Off

FIGURE 2-16 You can easily work collaboratively in Office 365.

Instant Messaging, Calls, and Web Meetings with Microsoft Lync

If you use instant messaging to get anything done—for business or for fun—you know the benefit of being able to communicate in real time, either one-to-one or one-to-many. Microsoft Lync Online, available as part of Office 365, provides all the real-time connection you need by offering an instant communications client with instant messaging, social media tracking, easy-to-use phone and video calls, and even features for setting up and hosting meetings. Figure 2-17 shows a Lync Online window in which two contacts are having a one-to-one conversation.



Getting ready for the meeting

Katherine Murray
Available
Set Your Location

Frequent Contacts
Julianne - Inactive 5 mins
offsite until 3pm EST
All Contacts (0/0)
To add contacts, drag from another group or add f...

Julianne - Inactive 5 mins

Katherine Murray 4:07 PM
Hi! I just got the proofs from the designer a few minutes ago--they look great!

Julianne 4:13 PM
That's good! I was wondering how soon we would see them. 🙂
I'll be in first thing tomorrow and we can go over them together.

Last message received on 1/30/2011 at 4:13 PM.

I'll be in around 9. See you then!

FIGURE 2-17 You can easily send instant messages to your team members, initiate audio or video calls, or host meetings with colleagues.

By default, Lync Online is set to offer as contacts only those included in your Office 365 team, but your administrator can set up your group so that you can communicate with others inside or outside your organization. What's more, others outside your group can be invited in for the meetings you host, so access and permissions don't pose a problem (while at the same time giving you the security you need to protect your information).

Behind-the-Scenes Support: Security and Reliability

Office 365 meets all kinds of needs for small businesses, but perhaps none is more important than this: you are working in a completely secure cloud, designed to provide multiple layers of protection so that your files, conversations, and collaborative efforts are safe. Office 365 services use 128-bit SSL/TSL encryption, which means that if communication is intercepted by an outside party, the file will be unreadable. Additionally, Microsoft Trustworthy Computing initiatives are in full force; antivirus signatures are continually updated, and Forefront Online Protection for Exchange protects and filters messages.

Tip ✓

Reliability is another promise Office 365 keeps well for small businesses. Because all services are in the cloud, you need to have guaranteed access to Web services to work reliably and productively. To help ensure that your work is always accessible to your team, many data centers all over the world host redundant network configurations. So if one data center is unavailable, another one takes its place so that your work can continue uninterrupted.

What's Next

In this chapter, you got the roadmap for creating your account, setting up your profile, and downloading the software you need to get started. You also had a chance to think through some of the tasks you want your teammates to be able to accomplish using the various Office 365 tools. If you will be administering the site—that is, managing user accounts and permissions—the next chapter offers the how-tos for managing Office 365 from the administrator side of things.

CHAPTER 3

Administering an Office 365 Account

IN THIS CHAPTER:

- Are You an Administrator?
- An Overview of Your Administrative Tasks
- First Things First: Key Tasks to Complete
- Adding and Managing Office 365 Users
- Viewing Domain Properties
- Setting Up and Managing Outlook and Exchange
- Setting Up SharePoint Online
- Configuring Lync Online
- Managing Your Subscriptions
- Getting Help with Office 365
- What's Next

IT CAN BE LONELY at the top. If you're the person responsible for setting up or at least managing the Office 365 account, you have a whole set of tasks and decisions to make that will affect the way your team interacts in the space. But don't worry—the choices are pretty simple, and they're easy to change later if necessary. And what's more, there's a community of administrators (and Microsoft MVPs) who are waiting in the wings to answer your questions if you get stuck along the way. Nice!

As you think through the way you want your team to interact in the cloud, you'll need to make decisions about who will have access (and what kind of access they will have), which services you want to use, how you want to manage your email, and how the various services will be set up to work for your team. This chapter walks you through all those choices and more so that when it's time to get everybody moving, you can hit the cloud running.

Are You an Administrator?

Administrator is an important-sounding word, and what it really means is this: you get to make decisions about your Office 365 account and get things set up the way you want them. With that glory comes responsibility, and this chapter will help you determine which items are important for your group and which are not. Specifically, you are an administrator if

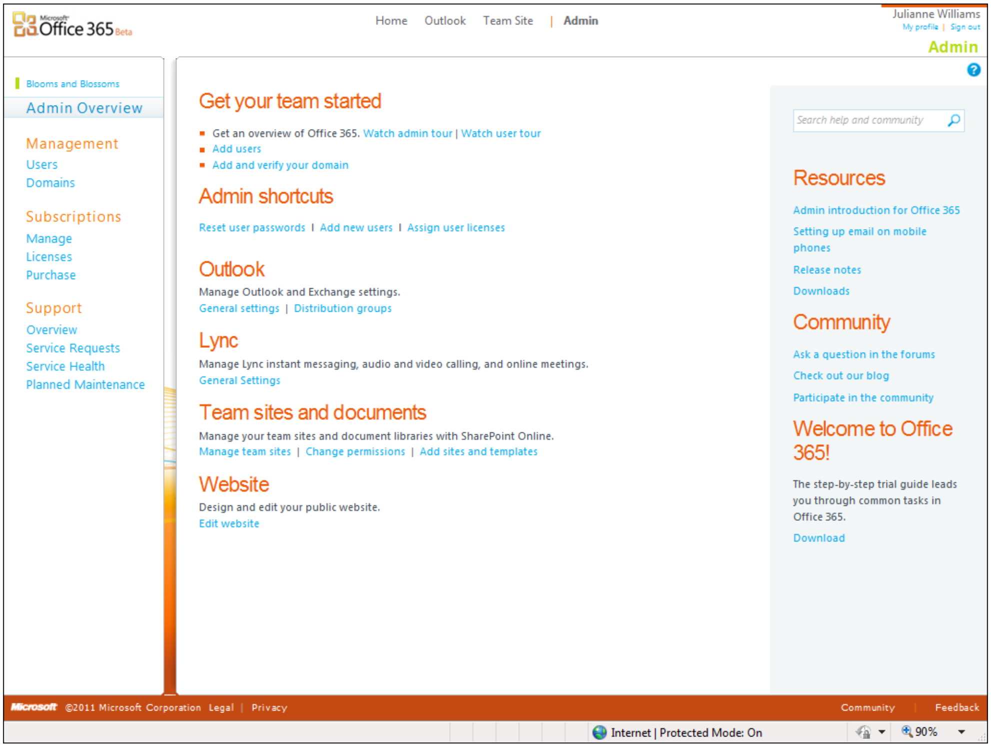
- You are creating and managing the account.
- It is up to you to add and manage users in the site.
- You assign and administer the different licenses your teammates use in Office 365. (I'll say more about that in a minute.)
- You are charged with setting up the various services the way you want them.
- You have been charged with a specific goal you'll be helping your group to achieve.
- You are the visionary behind the whole virtual team plan, and you want to see it work.
- You'll be designing, updating, and managing the SharePoint team site in your account.

You might be taking on one or more of those tasks—or perhaps your role is bigger or smaller. No matter—in Office 365, you can have more than one administrator, so if you want to share the wealth of features all the better. Just to keep things simple, though, it's generally a good idea to have one person in charge of things such as user accounts, permissions, and licenses. And if you have more than one administrator in the site, be sure you communicate about big-picture decisions such as whether you want to migrate email accounts so that other accounts combine with Office 365 mail or whether you want to allow members to include external contacts in Lync Online. Orchestrating those types of management choices helps you not duplicate—or undo—each other's efforts.

Tip ✓

An Overview of Your Administrative Tasks

So you already know you're a special person because you've got the keys to the kingdom. When you log in to your Office 365 account, if you're an administrator you'll see the Admin link at the top right side of the choices at the top of the screen. When you click Admin, the Admin Overview page appears, as you see in Figure 3-1.



Microsoft Office 365 Beta

Home | Outlook | Team Site | Admin

Julianne Williams
My profile | Sign out

Admin

Blooms and Blossoms

Admin Overview

Management
Users
Domains

Subscriptions
Manage
Licenses
Purchase

Support
Overview
Service Requests
Service Health
Planned Maintenance

Get your team started
- Get an overview of Office 365. Watch admin tour | Watch user tour
- Add users
- Add and verify your domain

Admin shortcuts
Reset user passwords | Add new users | Assign user licenses

Outlook
Manage Outlook and Exchange settings.
General settings | Distribution groups

Lync
Manage Lync instant messaging, audio and video calling, and online meetings.
General Settings

Team sites and documents
Manage your team sites and document libraries with SharePoint Online.
Manage team sites | Change permissions | Add sites and templates

Website
Design and edit your public website.
Edit website

Search help and community

Resources
Admin introduction for Office 365
Setting up email on mobile phones
Release notes
Downloads

Community
Ask a question in the forums
Check out our blog
Participate in the community

Welcome to Office 365!
The step-by-step trial guide leads you through common tasks in Office 365.
Download

Microsoft ©2011 Microsoft Corporation Legal | Privacy | Community | Feedback

Internet | Protected Mode: On | 90%

FIGURE 3-1 The Admin Overview page gives you access to the various ways you can administer the Office 365 account.

When you first click Admin after creating your Office 365 account, the Admin page shows the Get Your Team Started area at the top. This special group of links gives you what you need to know to begin setting up your site for your team. Specifically, you can

- Watch a video clip about the administrative tasks in Office 365.
- See a video of user tasks and learn about Office 365 services.
- Add new users to your account.
- Add and verify the web domain you want to use with the account.

The Admin Overview page is divided into three main areas. On the left side are links you use to manage the users and domains that are part of your Office 365 account. Here you add and remove users, set permissions, enter and change passwords, and update user properties and licenses. You can also view information about the various domains you set up to use with Office 365, manage your service subscriptions, and check the status of the system, get help, and review any existing technical support requests you created.

Tip

The area in the center of the page lists the various services available to you in Office 365. Clicking the various links under each of the service names, you will be able to

- Use the Admin Shortcuts to accomplish common tasks you will likely need to do regularly—such as reset user passwords, add users, and assign licenses for working with Office 365 services.
- Set up Outlook to work as you'd like for your computer, complete with email defaults and group usage.
- Prepare Lync for your team, and choose whether users can use Lync to communicate with groups external to your team.
- Work with your team sites, set user permissions for the site, and create new sites and pages.
- Create, design, and edit the public-facing website that is part of your Office 365 account.

The column on the right side of the Admin page offers links that provide more information about administering your Office 365 site, connecting a mobile device, accessing release notes, and downloading the utility you need to connect Lync Online and the Office Web Apps with your desktop applications.

First Things First: Key Tasks to Complete

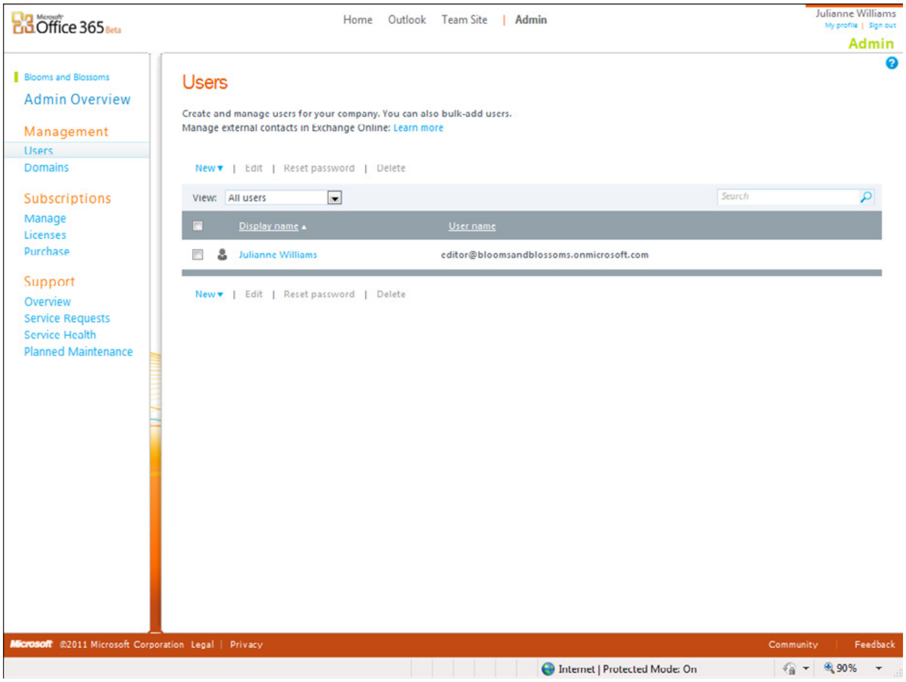
As you can see, that's a lot to do! The good news is that you don't have to tackle it all at once—you can grow into the features as you get familiar with the services. The most important thing when you're starting out if you're a small business is to accomplish the following tasks:

- Make sure team members have the permissions and licenses they need to log on and access Office 365 services.
- Make sure email is working the way you want it to for all your team members.
- Get started on the team site to provide access to the information your team needs.
- Set up Lync Online to allow file transfer and audio and video transmission if you want your group to have access to those features.
- Know how to get help, create service requests, and check system status.

In the sections that follow, you'll find out how to do each of these core tasks and prepare Office 365 for the happy arrival of your colleagues.

Adding and Managing Office 365 Users

Your first and perhaps most important task as the administrator of the Office 365 account is to make sure that your team can access the site. Click Users in the Management area to open the Users page. (See Figure 3-2.) In the Users screen of the Admin view, you can add and delete new users, edit permissions, and reset user passwords.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Julianne Williams
My profile | Sign out
Admin
Blooms and Blossoms
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance
Users
New ▾ | Edit | Reset password | Delete
View: All users
Search
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback
Internet | Protected Mode: On
90%

Create and manage users for your company. You can also bulk-add users.
Manage external contacts in Exchange Online: Learn more

☐	Display name ▴	User name
☐	Julianne Williams	editor@bloomsandblossoms.onmicrosoft.com

FIGURE 3-2 Click Users to add, edit, and update user information in Office 365.

Adding Users

After you click Users, the listing of team members already added to the site appears in the work area. If you're the only one who has accessed the site so far, yours might be the only email listed. You can add users one by one, if you're working with a small list, or you can add many users using a slightly different process. Here are the steps for each—choose the one you need.

Adding Users One at a Time

If you'll be working with a small team, or you've already created a team and just want to add a new user or two, the task is as simple as clicking the mouse and typing in a few pieces of information. Here are the steps:

1. Click New in the Users screen and click User.
2. In the New User Properties screen, add the name, display name, and email address you want to create for the new user
3. Click Additional Properties if you'd like to add additional information about this user in the site. (See Figure 3-3.)
4. Click Next.

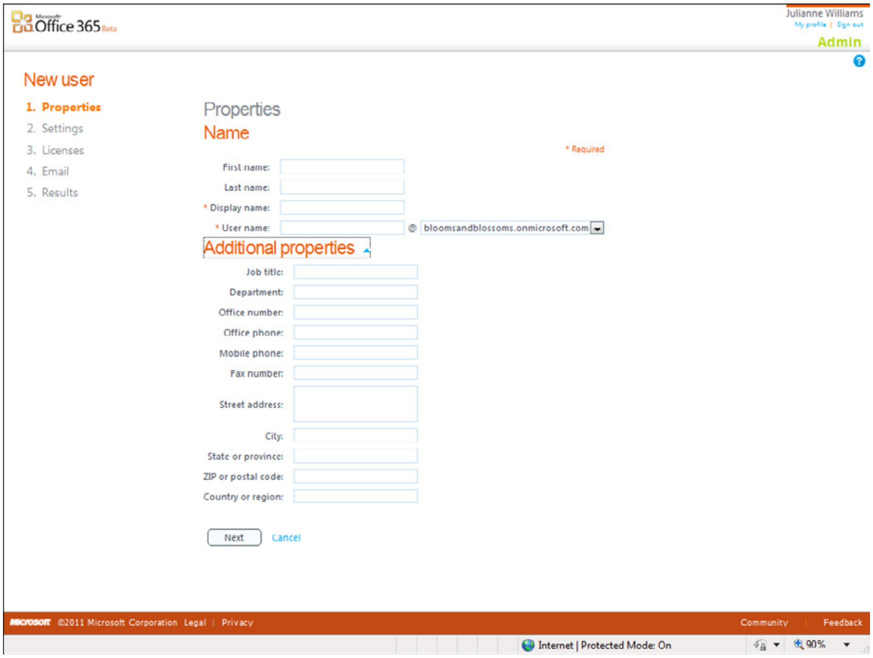

Microsoft Office 365 Beta
Julianne Williams
My profile | Sign out
Admin
New user
1. Properties
2. Settings
3. Licenses
4. Email
5. Results
Properties
Name
* Required
First name:
Last name:
* Display name:
* User name:
@ bloomsandblossoms.onmicrosoft.com
Additional properties
Job title:
Department:
Office number:
Office phone:
Mobile phone:
Fax number:
Street address:
City:
State or province:
ZIP or postal code:
Country or region:
Next
Cancel
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback
Internet | Protected Mode: On
90%

FIGURE 3-3 Adding a user is as simple as entering a display name and an email address.

You don't have to enter the person's first and last name, but you *do* need to enter a display name that will be visible to others in the site. Also, note that at this point you cannot add an existing email address outside of your site domain. Later if you'd like to connect an existing email address to this account, you can do so. See the section, "Migrate Your Email," to find out more.

Tip

After you've specified the basic properties for the new user account, you still need configure additional settings and permissions that control the way the new user will interact with Office 365 services. For more about how to do this, see the section, "Setting Permissions, User Location, and Sign-In Status," later in this chapter.

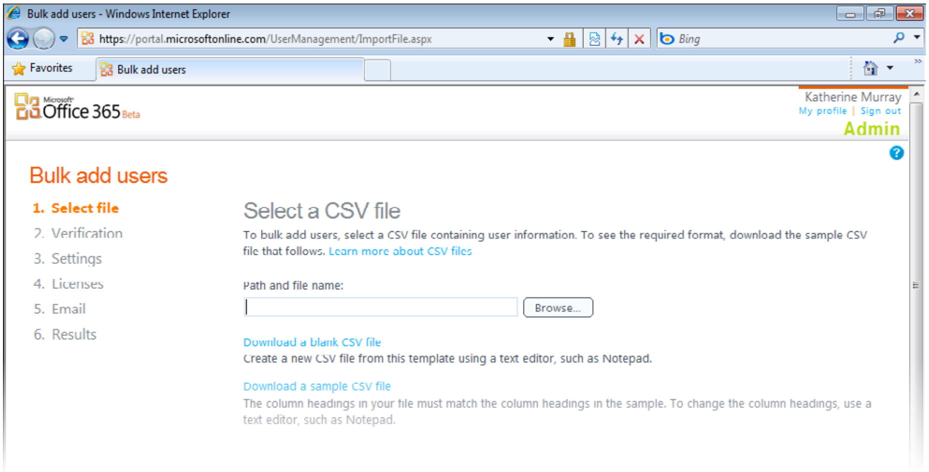
Adding Multiple Users at Once

If you have a number of users to add all at once—perhaps a department manager at work sent along a file of all the contact information for your team—you can simply upload the data file directly into Office 365 and create users that way.

To add multiple users all at once, follow these steps:

1. Click New, and choose Bulk Add Users.
2. In the Bulk Add Users page (shown in Figure 3-4), click the Browse button to open the Choose File To Upload dialog box.
3. Navigate to the folder containing the CSV file you want to use, click it, and click Open.

Tip


Bulk add users - Windows Internet Explorer
https://portal.microsoftonline.com/UserManagement/ImportFile.aspx
Bing
Favorites
Bulk add users
Microsoft Office 365 Beta
Katherine Murray
My profile | Sign out
Admin
1. Select file
2. Verification
3. Settings
4. Licenses
5. Email
6. Results
Browse...

Bulk add users

Select a CSV file

To bulk add users, select a CSV file containing user information. To see the required format, download the sample CSV file that follows. Learn more about CSV files

Path and file name:

Download a blank CSV file

Create a new CSV file from this template using a text editor, such as Notepad.

Download a sample CSV file

The column headings in your file must match the column headings in the sample. To change the column headings, use a text editor, such as Notepad.

FIGURE 3-4 Add many users all at once by importing a CSV file.

After Office 365 uploads the file, the user names are verified to ensure that all information is ready to use. The verification screen shows you which information passed muster and which produced errors.

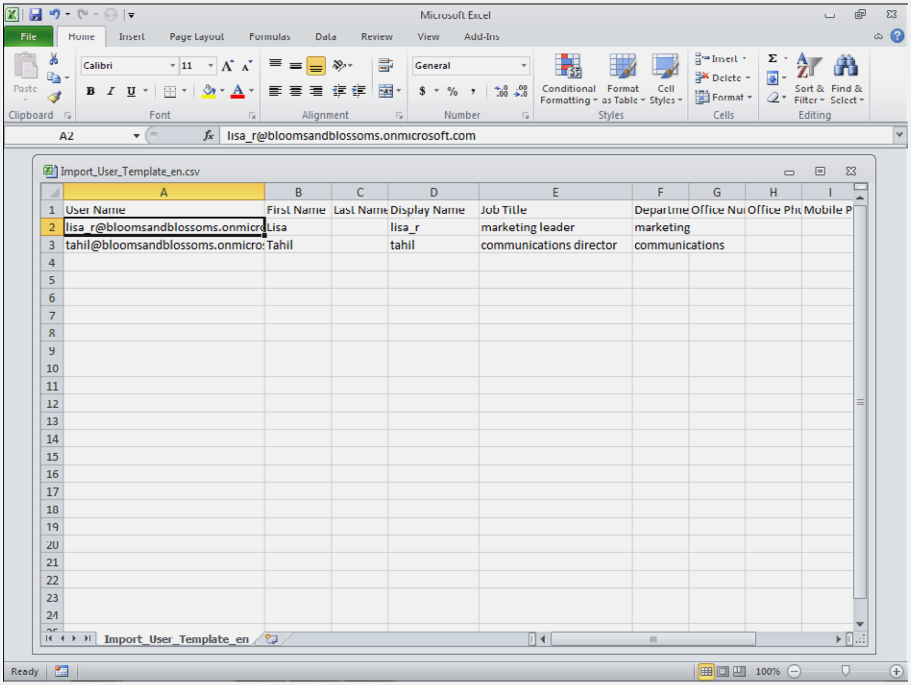
You can view any errors produced by clicking the View link in the Log File category. If you need to make a change to the data file, click the Back button at the bottom of the screen and then return to the data file, make any corrections, and upload the CSV file once again.

CREATE AND UPLOAD A CSV FILE

If you have user information you'd like to enter for everybody at once, you can download the sample CSV file Office 365 makes available for you, fill in your own data, and upload the file as described in the previous section. Alternatively, you can download a blank CSV file, add your own contact information, and upload the file to Office 365. Here's the process for creating your own CSV file for your team:

1. In Admin Overview, click Users.
2. Click New, and choose Bulk Add Users.
3. Click Download A Blank CSV File.
4. Click Open. This opens an Excel worksheet so that you can copy and paste or type your team information into the file. (See Figure 3-5.) Be sure to include the user's full email address in the User Name field.

5. Save the file to your Documents library (or another folder where you store team-related files).
6. Return to the Bulk Add Users screen, click Browse, navigate to the CSV file you just created, and add the file normally.
7. Click Next. Office 365 verifies the addition of the new users to make sure the information has been entered correctly.


Microsoft Excel
File
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
Paste
Clipboard
Calibri
11
Font
Alignment
General
Number
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
Sort & Filter
Find & Select
Editing
Import_User_Template_en.csv
Import_User_Template_en
Ready
100%

A2 lisa_r@bloomsandblossoms.onmicrosoft.com

	A	B	C	D	E	F	G	H	I
1	User Name	First Name	Last Name	Display Name	Job Title	Departme	Office Nu	Office Ph	Mobile P
2	lisa_r@bloomsandblossoms.onmicro	Lisa		lisa_r	marketing leader	marketing			
3	tahil@bloomsandblossoms.onmicro:	Tahil		tahil	communications director	communications			

FIGURE 3-5 When you click Open, Office 365 displays an Excel file with fields already set up to record user information.

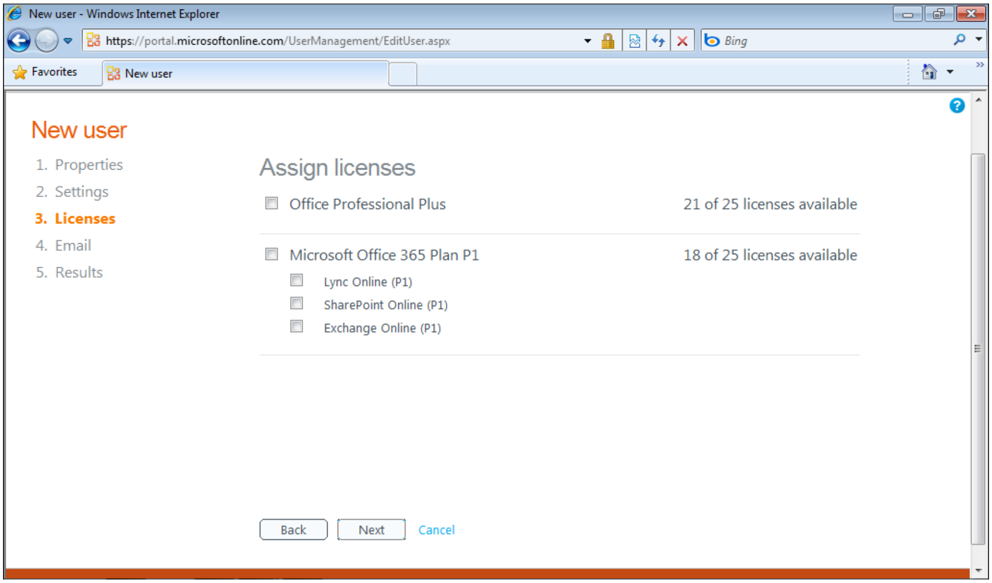
Setting Permissions, User Location, and Sign-In Status

The next step in the process depends on whether you are adding a single new user or are bulk adding new users. If you are adding only a single new user, the Settings screen is where you assign permissions and a location to the user. For the Permissions option, you can choose whether the user is to be an Office 365 administrator or not. To set the user location for an individual user, click the Select A Location arrow and choose the user's country from the displayed list. Office 365 is available in a number of countries around the world, but not all countries have access to the same services. Select the user's country for the displayed list, and click Next.

If you are bulk-adding new users, however, the Permissions option is replaced with a Set Sign-in Status option, where you choose to allow or block access to Office 365 services by the user. If you bulk-add new user accounts before employees are ready to use these accounts, you can choose Deny to keep the accounts inactive. Then when an employee is ready to use an account, you can change the sign-in status from Blocked to Allowed. In addition to configuring sign-in status, you must also specify a location when bulk-adding users.

Assigning Licenses

The next step involved in getting your users set up to use Office 365 involves assigning them the licenses they need to use the services in the site. Depending on the version of Office 365 you are using, you might have two different sets of licenses available, as Figure 3-6 shows.


New user - Windows Internet Explorer
https://portal.microsoftonline.com/UserManagement/EditUser.aspx
Bing
Favorites
New user

New user

1. Properties
2. Settings
3. **Licenses**
4. Email
5. Results

Assign licenses

☐ Office Professional Plus	21 of 25 licenses available
☐ Microsoft Office 365 Plan P1	18 of 25 licenses available
☐ Lync Online (P1)	
☐ SharePoint Online (P1)	
☐ Exchange Online (P1)	

FIGURE 3-6 Click the license you want to assign to the new users you are adding.

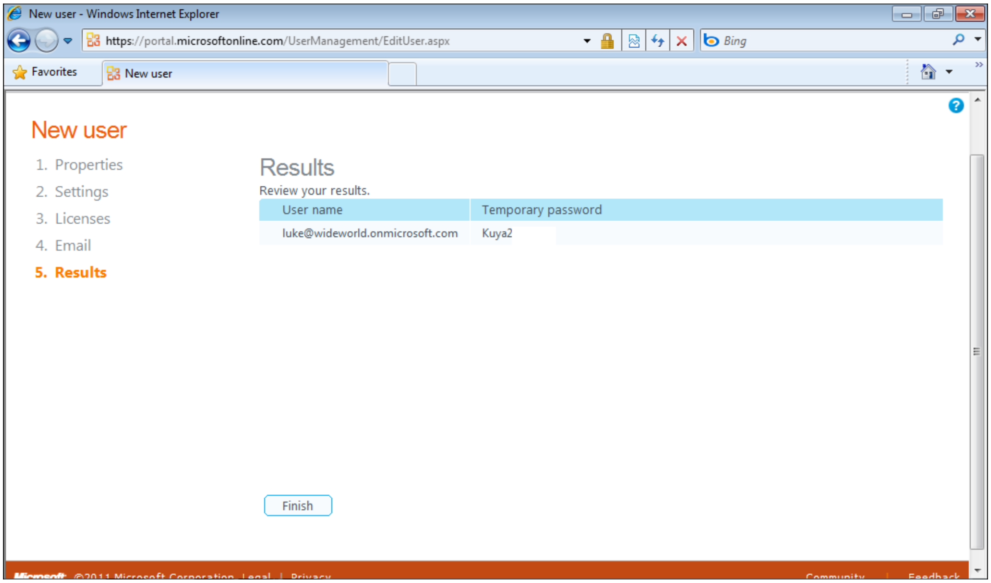
Select the check box of the services you want the new user to be able to access. Office 365 shows on the right side of the screen the number of licenses you can assign to your various team members. When you are satisfied with your selections, click Next.

Tip

Sending an Invitation Email

Next Office 365 will walk you through the process of sending an email message to the new team member that includes an autogenerated password. By default, Office 365 enters the email address of the administrator who is creating the account. For security purposes, this email should generally be sent to an administrator and not to the new user account that is being created. The admin should then communicate the temporary password to the new user. This is especially true when creating bulk users because you don't want each new user to know the temporary password of every other new user being created.

Click Create. Office 365 generates and sends the message, and then displays a report so that you can see that the message is on its way to the new user. (See Figure 3-7.) Click Finish to close the Results window and return to the Users window.


New user - Windows Internet Explorer
https://portal.microsoftonline.com/UserManagement/EditUser.aspx
Bing
Favorites
New user
New user
1. Properties
2. Settings
3. Licenses
4. Email
5. Results
Finish

Results

Review your results.

User name	Temporary password
luke@wideworld.onmicrosoft.com	Kuya2

FIGURE 3-7 Office 365 lets you know that the email has been sent successfully.

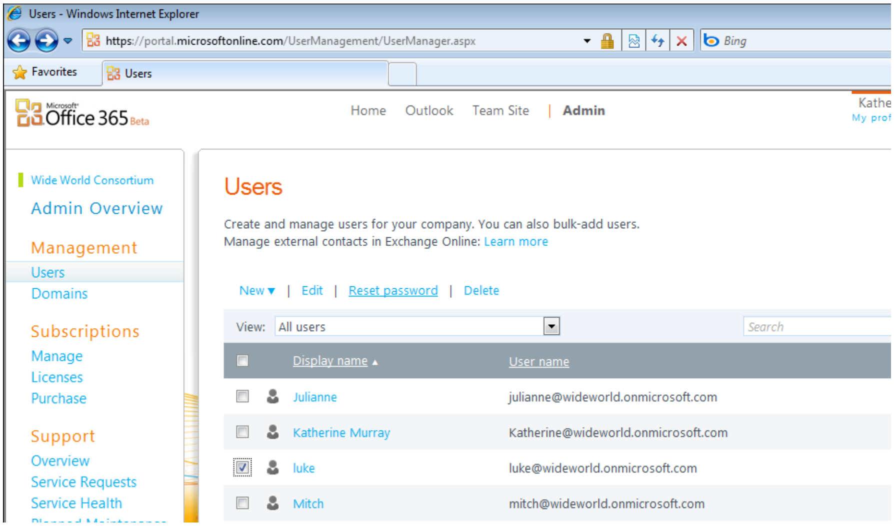
That's the whole process for adding users to Office 365. At any time, you can add users individually, add another set of bulk users, or update properties for individual users as needed. You need to keep an eye on the number of licenses you have available, of course, but the process itself is a simple one.

Changing Passwords

The users you added will be able to access your Office 365 site and log in using the temporary password that was generated for them when their account was created. Depending on the security systems in place in your particular business, however, users might not receive the email or might have trouble logging in. And, of course, some users—including yours truly—just lose stuff from time to time (which is another reason to have the temporary password emailed directly to you as the admin).

Office 365 knows that as an admin, managing passwords might be one of your biggest headaches. Luckily, it's one that can be healed easily. When you get a request to change a user's password and help that user access the site, you can do it in five simple steps. Here's how:

1. Log in to Office 365, and click Admin.
2. In Admin Shortcuts, click Reset User Passwords.
3. Select the check box of the user whose password you want to change.
4. Click Reset Password. (See Figure 3-8.)
5. Again, your email address as the administrator will appear in the text box. Click the Reset Password button to email yourself a copy of the new password, which you can then pass along to the user.


Users - Windows Internet Explorer
https://portal.microsoftonline.com/UserManagement/UserManager.aspx
Bing
Favorites
Users
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Kathe
My prof
Wide World Consortium
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Users
New ▾
Edit
Reset password
Delete
View: All users
Search

Create and manage users for your company. You can also bulk-add users.
Manage external contacts in Exchange Online: Learn more

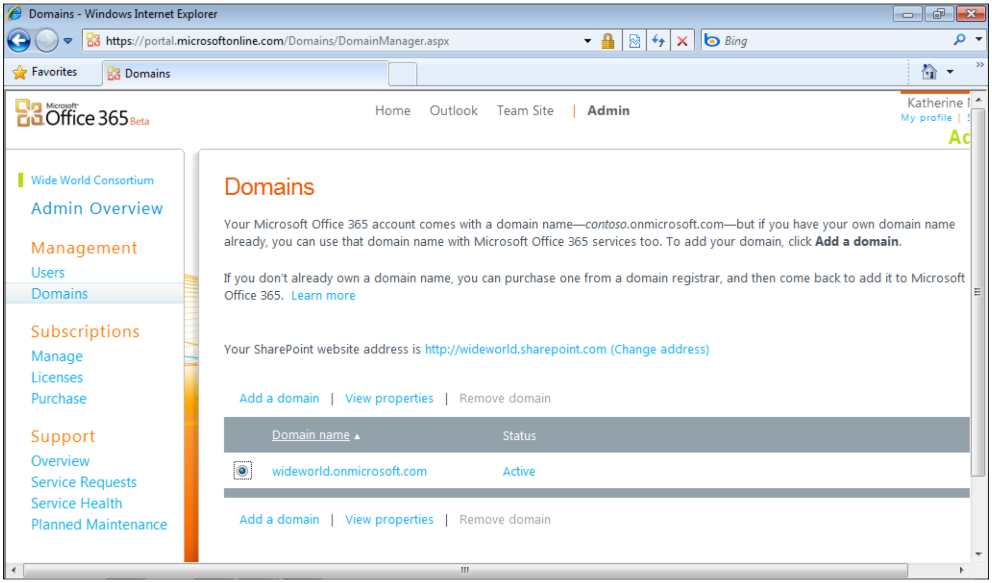
☐	Display name ▲	User name
☐	Julianne	julianne@wideworld.onmicrosoft.com
☐	Katherine Murray	Katherine@wideworld.onmicrosoft.com
☑	luke	luke@wideworld.onmicrosoft.com
☐	Mitch	mitch@wideworld.onmicrosoft.com

FIGURE 3-8 You can easily reset the password in the Users screen of Admin view.

Viewing Domain Properties

Another part of your responsibilities as administrator involves keeping an eye on the domains that are part of your account. Depending on how complex your needs are, this might be super simple: you might have only one domain registered with Office 365. This enables you to track your team, create a team site, access the services you've sign up for, and so on.

But if your scenario isn't quite so simple and you are managing multiple domains and many different sites, being able to display the domain information will be helpful. You can view the domains in use with your account by clicking Admin and then clicking Domains in the links on the left side of the Admin Overview screen. (See Figure 3-9.) The Status column on the right shows you whether the site is currently active or inactive. You can display the properties of a selected domain by clicking the domain's radio button to the left of the domain name and clicking View Properties.


Domains - Windows Internet Explorer
https://portal.microsoftonline.com/Domains/DomainManager.aspx
Bing
Favorites
Domains
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine
My profile
Wide World Consortium
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance
Add a domain | View properties | Remove domain

Domains

Your Microsoft Office 365 account comes with a domain name—*contoso*.onmicrosoft.com—but if you have your own domain name already, you can use that domain name with Microsoft Office 365 services too. To add your domain, click **Add a domain**.

If you don't already own a domain name, you can purchase one from a domain registrar, and then come back to add it to Microsoft Office 365. Learn more

Your SharePoint website address is http://wideworld.sharepoint.com (Change address)

	Domain name ▲	Status
●	wideworld.onmicrosoft.com	Active

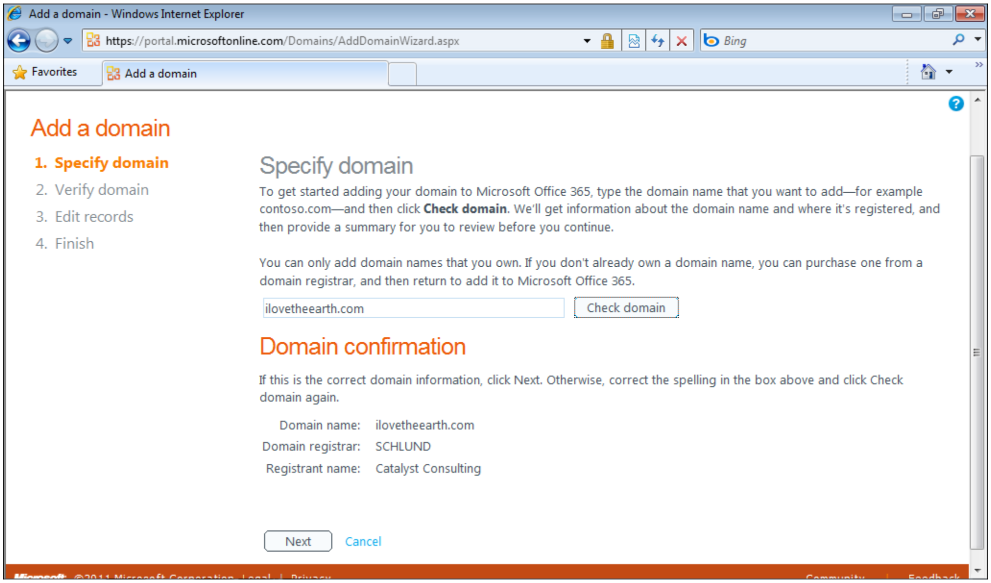
FIGURE 3-9 View the domains included on your account by clicking Domains in the Management area of Admin view.

Adding a Domain to Office 365

When you sign up for your Office 365 account, you are assigned a default domain name of the form *yourcompany*.onmicrosoft.com, where *yourcompany* is a name you specify during the signup process. This domain name is then used to set up your services, set up email, and more. You can also add a domain name you already have to your Office 365 account if you'd like. If your domain name is registered, you can add it to Office 365 by using the Add A Domain link in the top left column of the domain listing.

You must own the domain name you choose to add to the Office 365 domains. At any point in the process, you can purchase a domain name from a domain registration site, such as Network Solutions, and click Add A Domain to assign it to Office 365.

On the Specify Domain screen, click in the text box at the bottom of the page, type the domain name you want to add (for example, wideworld.com), and click Check Domain. Office 365 displays the information found about that domain in the Domain Confirmation screen. (See Figure 3-10.)


Add a domain - Windows Internet Explorer
https://portal.microsoftonline.com/Domains/AddDomainWizard.aspx
Bing
Favorites
Add a domain

Add a domain

1. Specify domain
2. Verify domain
3. Edit records
4. Finish

Specify domain

To get started adding your domain to Microsoft Office 365, type the domain name that you want to add—for example contoso.com—and then click **Check domain**. We'll get information about the domain name and where it's registered, and then provide a summary for you to review before you continue.

You can only add domain names that you own. If you don't already own a domain name, you can purchase one from a domain registrar, and then return to add it to Microsoft Office 365.

ilovetheearth.com

Domain confirmation

If this is the correct domain information, click Next. Otherwise, correct the spelling in the box above and click Check domain again.

Domain name: ilovetheearth.com
Domain registrar: SCHLUND
Registrant name: Catalyst Consulting

FIGURE 3-10 After you add the domain name and click Check Domain, Office 365 displays the information found about your pre-existing domain.

Click Next to continue the process. In the Verify Domain window, if you're ready to transfer the domain to your Office 365 account, follow the instructions provided to create a subdomain, edit the DNS settings, and complete the necessary permissions. You might need to involve your domain registrar in this process.

Finally, click Verify to finalize the process and make the domain available to Office 365. The entire operation might take up to 72 hours to complete. In the meantime, your added domain will appear as Pending Verification in the domain table in the Domains window.

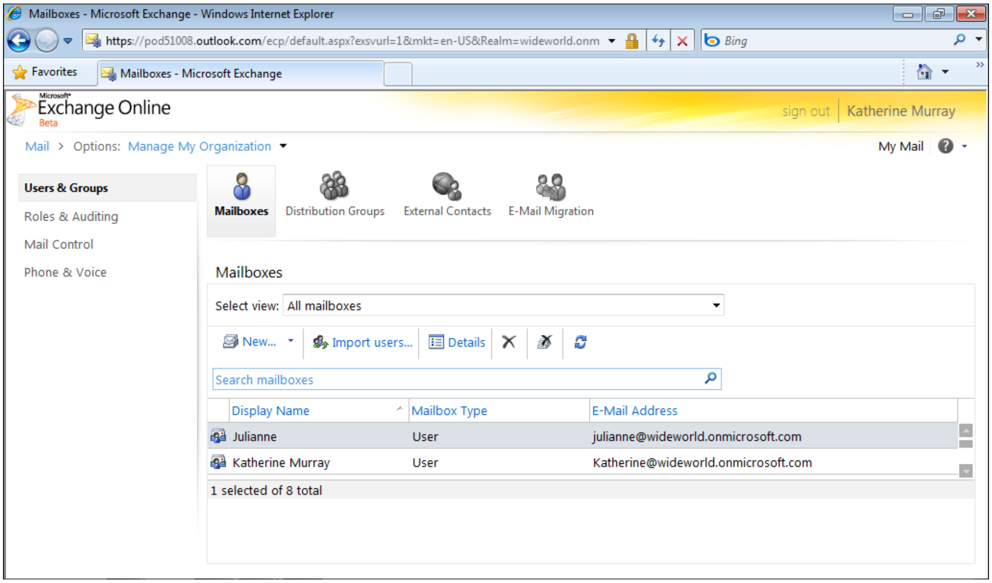
Setting Up and Managing Outlook and Exchange

Now that you've got your users set up in the site, you're ready to begin setting up your services. Let's start with Outlook and Exchange, which you can use to create new mailboxes, create groups, set up calendars, and more.

Begin the process by clicking Admin and, in the Admin Overview window, click General Settings in the Outlook area. The Exchange Online screen appears (shown in Figure 3-11), where you can set up defaults for a number of features, including the following:

- Add mailboxes
- Create distribution lists
- Set up external contacts
- Add other email accounts to Exchange Online

Tip


Mailboxes - Microsoft Exchange - Windows Internet Explorer
https://pod51008.outlook.com/ecp/default.aspx?exsvurl=1&mkt=en-US&Realm=wideworld.onm
Bing
Favorites
Mailboxes - Microsoft Exchange
Microsoft Exchange Online
Beta
sign out
Katherine Murray
Mail > Options: Manage My Organization
My Mail
Users & Groups
Roles & Auditing
Mail Control
Phone & Voice
Mailboxes
Distribution Groups
External Contacts
E-Mail Migration
Mailboxes
Select view: All mailboxes
New...
Import users...
Details
Search mailboxes
1 selected of 8 total

Display Name	Mailbox Type	E-Mail Address
Julianne	User	julianne@wideworld.onmicrosoft.com
Katherine Murray	User	Katherine@wideworld.onmicrosoft.com

FIGURE 3-11 Exchange Online enables you to set up the way you want email to work in Office 365.

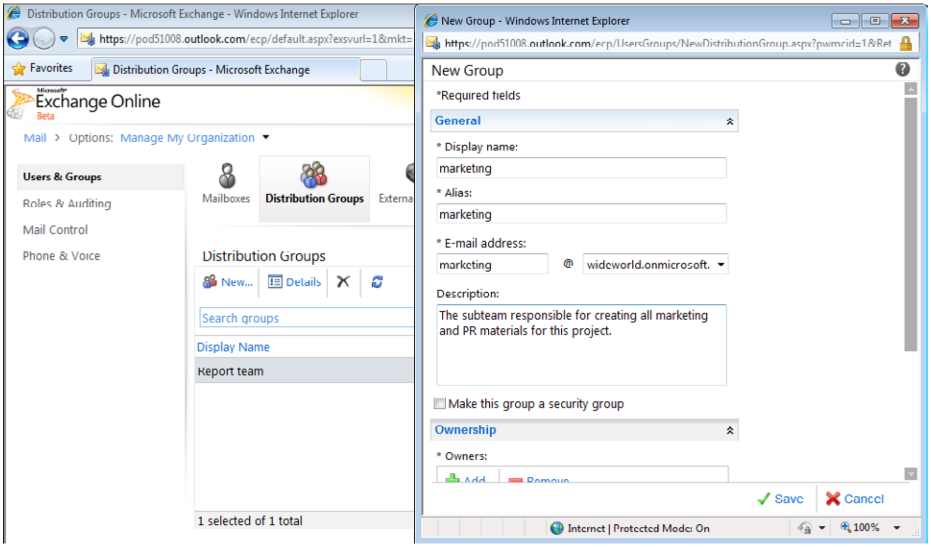
The Mailboxes features in Exchange Online follow steps similar to the ones you've already taken to set up your users in Office 365. You can click New in the Mailboxes screen to add a new user or click Import Users to upload a CSV file. The list of current users in your Office 365 account are displayed in the table at the bottom of the screen.

` **Tip**

Create a Distribution List

You can create a distribution list in Exchange Online to control the flow of outgoing communications. If you regularly send out status updates from the site, for example, or you publish a list of site changes on a weekly basis, you can create a distribution list to make sure that all the users who need to receive that information get the message. To create a distribution list for your users in Exchange, follow these steps:

1. In the Outlook area of the Admin Overview page, click Distribution Groups.
2. Click New on the Distribution Groups tab.
3. Enter a name, alias, and description for the distribution list.
4. If you want the group to be secure so that people can join the group only by requesting to be added to the secure list, select the Make This Group A Security Group check box. (See Figure 3-12.)
5. Click the Membership area, and click Add; then click the user or users you want to add to the list. Click Add at the bottom of the dialog box and click OK.
6. Choose any additional options—or add other users as owners of the list—and click Save.


Distribution Groups - Microsoft Exchange - Windows Internet Explorer
https://pod51008.outlook.com/ecp/default.aspx?exsvurl=1&mkt=
Favorites
Distribution Groups - Microsoft Exchange
Exchange Online
Beta
Mail > Options: Manage My Organization
Users & Groups
Roles & Auditing
Mail Control
Phone & Voice
Mailboxes
Distribution Groups
Externa
Distribution Groups
New...
Details
Search groups
Display Name
Report team
1 selected of 1 total
New Group - Windows Internet Explorer
https://pod51008.outlook.com/ecp/UsersGroups/NewDistributionGroup.aspx?pwmcid=1&Ret
New Group
*Required fields
General
Ownership
* Owners:
Add
Remove
Save
Cancel
Internet | Protected Mode: On
100%

* Display name: marketing

* Alias: marketing

* E-mail address: marketing @ wideworld.onmicrosoft.

Description: The subteam responsible for creating all marketing and PR materials for this project.

☐ Make this group a security group

FIGURE 3-12 You can create a distribution list to send specific communication to selected users.

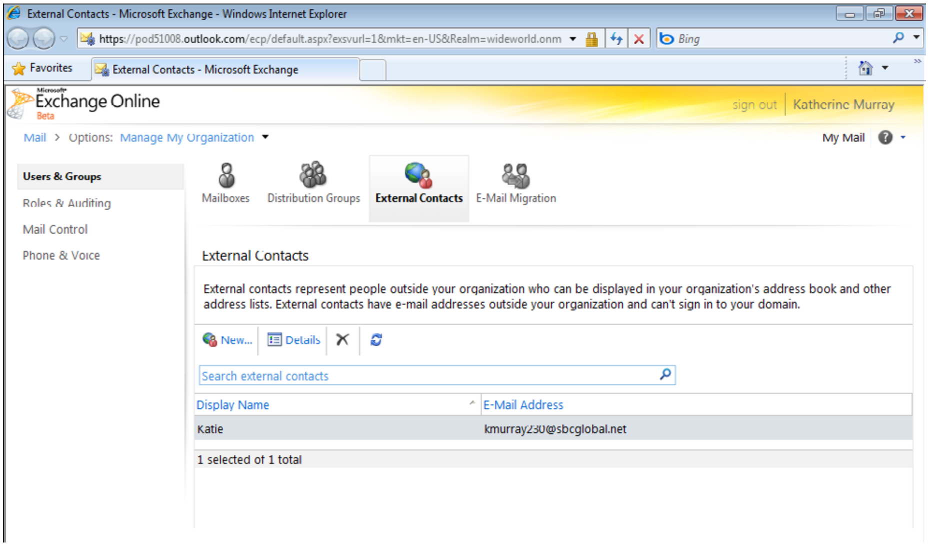
Add External Contacts

One of the great things about your Office 365 account is that you can create a completely secure space in the cloud where your team can collaborate and focus on specific tasks at hand. But part of your work is sure to require correspondence with contacts outside your happy little group, whether they are customers, contractors, or other colleagues who aren't part of your Office 365 team.

You can set up external contacts to allow users outside your organization to receive email from and send email to your team. The users you add will actually appear in your team's address book, but they won't be able to access your site. To add an external contact to your list, follow these steps:

1. In the Admin Overview page, click General Settings in the Outlook area.
2. In the Exchange Online screen, click External Contacts.
3. Click New.
4. Enter the name, alias, and email address of the external contact.

5. Click Save. The external contact is added to the list at the bottom of the External Contacts screen. (See Figure 3-13.)


External Contacts - Microsoft Exchange - Windows Internet Explorer
https://pod51008.outlook.com/ecp/default.aspx?exsvurl=1&mkt=en-US&Realm=wideworld.onm
Bing
Favorites
External Contacts - Microsoft Exchange
Microsoft Exchange Online Beta
sign out
Katherine Murray
Mail > Options: Manage My Organization
My Mail
Users & Groups
Roles & Auditing
Mail Control
Phone & Voice
Mailboxes
Distribution Groups
External Contacts
E-Mail Migration
New...
Details
Search external contacts

External Contacts

External contacts represent people outside your organization who can be displayed in your organization's address book and other address lists. External contacts have e-mail addresses outside your organization and can't sign in to your domain.

Display Name	E-Mail Address
Katie	kmurray230@sbcglobal.net

1 selected of 1 total

FIGURE 3-13 You can create a list of external contacts who will be able to communicate with your Office 365 team.

The external contact will show up in your address book so that you can send messages to and receive messages from the person you've added to the list.

Migrate Your Email

As you lead your team into the cloud, you might be considering migrating your email from your traditional server-bound configuration to a new cloud address at Office 365. This enables you to keep all your messaging—address books, rules and alerts, messages, and more—available online from any point of access, anytime. You can easily move your existing mailboxes to Office 365, or you can keep the mailboxes on the server and use your Office 365 mail alongside the server-based setup.

Office 365 enables you to coordinate your various email accounts in a couple of different ways. If you're using POP accounts, you can use Connected Accounts in Outlook Web App to add access to those accounts to your Office 365 account. (You'll learn more about this in Chapter 10, "Email and Organize in Office 365.")

For other types of email accounts such as IMAP accounts , you can use the Email Migration tool to move your email accounts to the mailboxes in Office 365. Here are the steps:

1. In the Admin Overview screen, click General Settings in the Outlook category.
2. Click EMail Migration.
3. Click New.
4. Select the type of email account you'll be migrating, and click Next.
5. Specify the account information as requested.
6. In the Start Migration page, click Run.

After the migration is complete, Office 365 sends you a status email giving you information about the migration—how many mailboxes and distribution groups migrated successfully, whether any errors were produced, as well as a report providing login keys for the migrated mailboxes. Your users will need these keys to log in to their mail in Office 365 after the account has migrated, so be sure to save this information. Users will change the password after their first login to the migrated account.

Setting Up SharePoint Online

You will use your SharePoint site to stay in touch with your team, share documents, assign tasks, post questions, provide updates, and more. You can also use SharePoint to create your own public website, giving your customers or clients a professional-looking site where they can find up-to-date information about your products or services.

As an administrator, your first task is to make sure all your team members can get into the SharePoint site and that the basics are in place so that people can begin creating the team experience you want them to create. This section focuses on setting up users and permissions, and the rest of the customizing experience (as well as all the how-tos for basic SharePoint Online tasks) is covered in Chapter 5, "Creating Your Team Site with SharePoint Online."

Adding Users for SharePoint Online

Your first task involves adding users to your SharePoint team site. Even though you have already set up user accounts in Office 365, those users aren't automatically added to

SharePoint—you need to do that yourself. To add your team members to the SharePoint site, follow these steps:

1. In the Admin Overview page, click Manage Team Sites in the Team Sites And Documents area.
2. In the Team Site Settings screen (shown in Figure 3-14), click People And Groups in the Users And Permissions area.

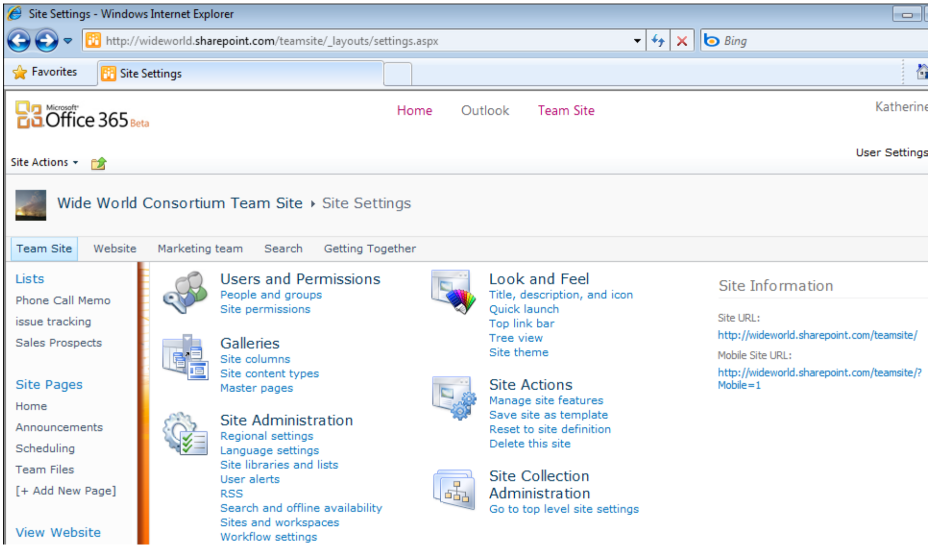
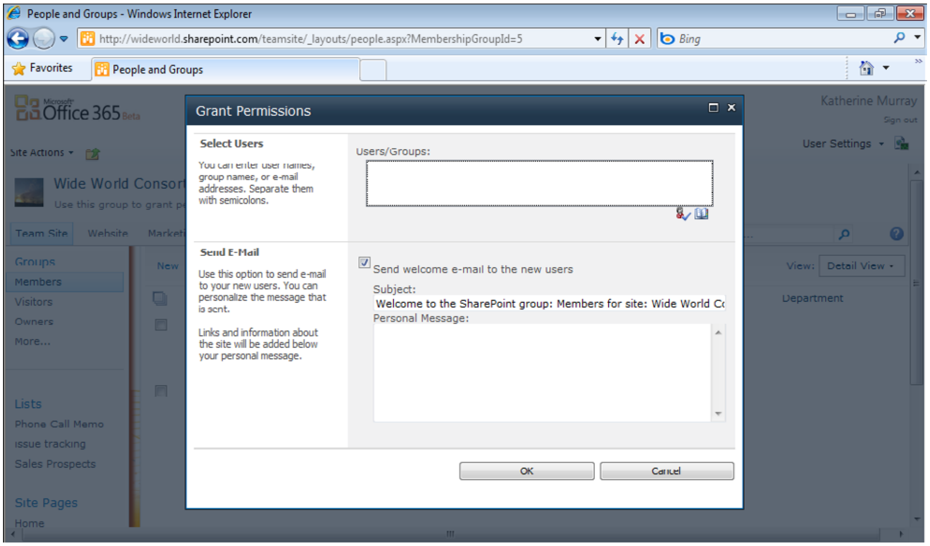

Site Settings - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/_layouts/settings.aspx
Bing
Favorites
Site Settings
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine
User Settings
Site Actions
Wide World Consortium Team Site ▸ Site Settings
Team Site
Website
Marketing team
Search
Getting Together
Lists
Phone Call Memo
issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Users and Permissions
People and groups
Site permissions
Galleries
Site columns
Site content types
Master pages
Site Administration
Regional settings
Language settings
Site libraries and lists
User alerts
RSS
Search and offline availability
Sites and workspaces
Workflow settings
Look and Feel
Title, description, and icon
Quick launch
Top link bar
Tree view
Site theme
Site Actions
Manage site features
Save site as template
Reset to site definition
Delete this site
Site Collection Administration
Go to top level site settings
Site Information
Site URL:
http://wideworld.sharepoint.com/teamsite/
Mobile Site URL:
http://wideworld.sharepoint.com/teamsite/?Mobile=1

FIGURE 3-14 SharePoint Online offers a whole world of settings you can use to tailor the way your site looks and acts.

3. Under Groups in the navigation area on the left side of the screen, click Members and click New.
4. Click Add Users. The Grant Permissions dialog box appears. (See Figure 3-15.)
5. Enter the email addresses of your team members, separating them with semicolons.
6. In the Personal Message box, type a message you want your team members to receive.
7. Click OK. The new users are added to the Members list.


People and Groups - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/_layouts/people.aspx?MembershipGroupId=5
Bing
Favorites
People and Groups
Office 365 Beta
Katherine Murray
Sign out
Site Actions
User Settings
Wide World Consor
Use this group to grant p
Team Site
Website
Marketi
Groups
Members
Visitors
Owners
More...
Lists
Phone Call Memo
Issue tracking
Sales Prospects
Site Pages
Home
New
View:
Detail View
Department
Grant Permissions
Select Users
Users/Groups:
Send E-Mail
OK
Cancel

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Use this option to send e-mail to your new users. You can personalize the message that is sent.

Links and information about the site will be added below your personal message.

☑ Send welcome e-mail to the new users

Subject: Welcome to the SharePoint group: Members for site: Wide World Co

Personal Message:

FIGURE 3-15 Add your team members to the Users/Groups field by typing their email addresses, separated by semi-colons.

Assigning User Permissions

Now that you've added people to the site, you can set the user permissions so that your team members can perform the tasks you want them to accomplish in the site. You can do this in one of two ways in SharePoint Online, and it's just a bit confusing if you've never worked with SharePoint before.

SharePoint enables you to assign permissions for specific individuals, or you can assign permissions by groups, and make sure that individual team members are part of the group you want to have the necessary access level. For example, you might give some team members the ability to view and change content, while others have only the permissions they need to review content posted in the site.

SharePoint offers six permission levels: View Only, Enhanced Contribute, Read, Contribute, Design, and Full Control. Table 3-1 defines each of these permission levels.

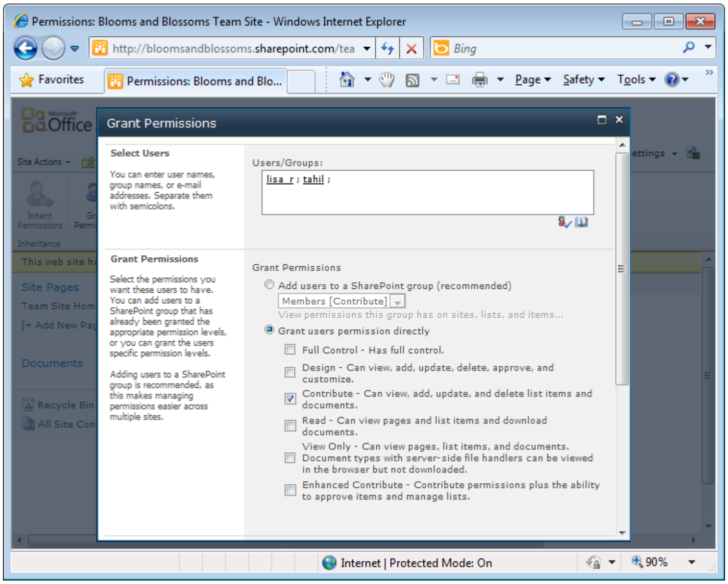
TABLE 3-1 User Permission Levels in SharePoint Online

Permission Level	Permitted User Action
View Only	View content but not edit it
Read	View and download content
Contribute	View, edit, add to, and remove content
Design	View, edit, add to, remove, approve, and customize content
Full Control	Has full control of the SharePoint site
Enhanced Contribute	View, edit, add to, and remove content, and approve items and manage lists

The simplest way to work with permissions for your team members is to begin with the basics: each new member you add to SharePoint is given Member privileges, which means the new member can read all content on the site and contribute to that content (through editing, adding, or removing material). So if you're fine with everyone being able to read and edit the site, you're good—no changes are required.

If you want to change the default permission for a specific user—either limiting the permission so that the user can only read the information, for example, or granting full control so that the team member can make all kinds of changes on the site (including adding and removing user accounts), you need to know how to modify permissions. Here's how to do that:

1. On the Admin Overview page, click Manage Team Sites in the Team Sites And Documents category.
2. On the Team Site Settings page, click Site Permissions in the Users And Permissions area.
3. Click Grant Users Permission Directly (shown in Figure 3-16), and then click the permission level you want to assign to the team member.
4. Type the text for the email message if you want to send one, and click OK. The team member is assigned the permission level you selected.


Permissions: Blooms and Blossoms Team Site - Windows Internet Explorer
http://bloomsandblossoms.sharepoint.com/tea
Bing
Favorites
Permissions: Blooms and Blo...
Page
Safety
Tools
Office
Site Actions
Inherit Permissions
Inheritance
This web site ha
Site Pages
Team Site Hom
[+ Add New Pag
Documents
Recycle Bin
All Site Con
ettings
Internet | Protected Mode: On
90%

Grant Permissions

Select Users

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Users/Groups:

lisa_r ; tahil ;

Grant Permissions

Select the permissions you want these users to have. You can add users to a SharePoint group that has already been granted the appropriate permission levels, or you can grant the users specific permission levels.

Adding users to a SharePoint group is recommended, as this makes managing permissions easier across multiple sites.

Grant Permissions

○ Add users to a SharePoint group (recommended)

Members [Contribute]

View permissions this group has on sites, lists, and items...

● Grant users permission directly

- ☐ Full Control - Has full control.
- ☐ Design - Can view, add, update, delete, approve, and customize.
- ☑ Contribute - Can view, add, update, and delete list items and documents.
- ☐ Read - Can view pages and list items and download documents.
- ☐ View Only - Can view pages, list items, and documents. Document types with server-side file handlers can be viewed in the browser but not downloaded.
- ☐ Enhanced Contribute - Contribute permissions plus the ability to approve items and manage lists.

FIGURE 3-16 Click Grant Users Permissions Directly to choose individual permissions for the users you select.

GROUP TYPES AND PERMISSIONS IN SHAREPOINT

If you're working with large teams or coordinating the activities of more than one team, you might find the group method easier because you can simply assign team members to the specific group and then manage the permissions for everyone all at once. The groups SharePoint sets up by default are these:

- Members, who can read content and contribute to the content on the site
- Owners, who have full control of the site
- Tenant Users, who are given the permissions you assign to your domain group
- Viewers, who can read all content on the site
- Visitors, who can read the content on the site when they are granted access
- Website Designers, who are assigned design privileges

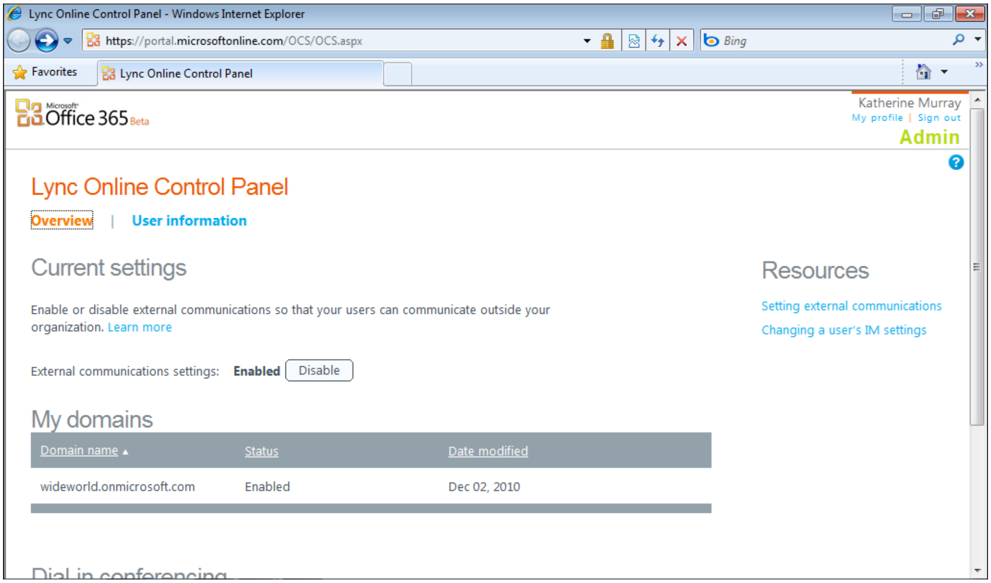
You can use these groups or create a new group with the permissions you want to provide to your team members by using the controls in the Users And Permissions area of the SharePoint Settings screen.

Configuring Lync Online

Your final task for setting up Office 365 for the rest of your team involves making sure Microsoft Lync Online is ready to help members communicate the way you need it to. Depending on the types of projects you work on and the ways in which you want your colleagues to connect, you might choose to turn on various features to help files and messages flow a little more smoothly.

Set External Communications

Begin in the Admin Overview page by clicking General Settings in the Lync area. The Lync Online Control Panel appears, as you see in Figure 3-17, providing options for you to allow or disable external communications (meaning that people outside your organization will—or won't—be able to contact your team in Office 365). In addition to setting up external communications, you can tailor the settings and permissions you've assigned to each user.


Lync Online Control Panel - Windows Internet Explorer
https://portal.microsoftonline.com/OCS/OCS.aspx
Bing
Favorites
Lync Online Control Panel
Microsoft Office 365 Beta
Katherine Murray
My profile | Sign out
Admin
Overview | User information
Disable

Lync Online Control Panel

Current settings

Enable or disable external communications so that your users can communicate outside your organization. Learn more

External communications settings: **Enabled**

My domains

Domain name ▲	Status	Date modified
wideworld.onmicrosoft.com	Enabled	Dec 02, 2010

Dial-in conferencing

Resources

Setting external communications

Changing a user's IM settings

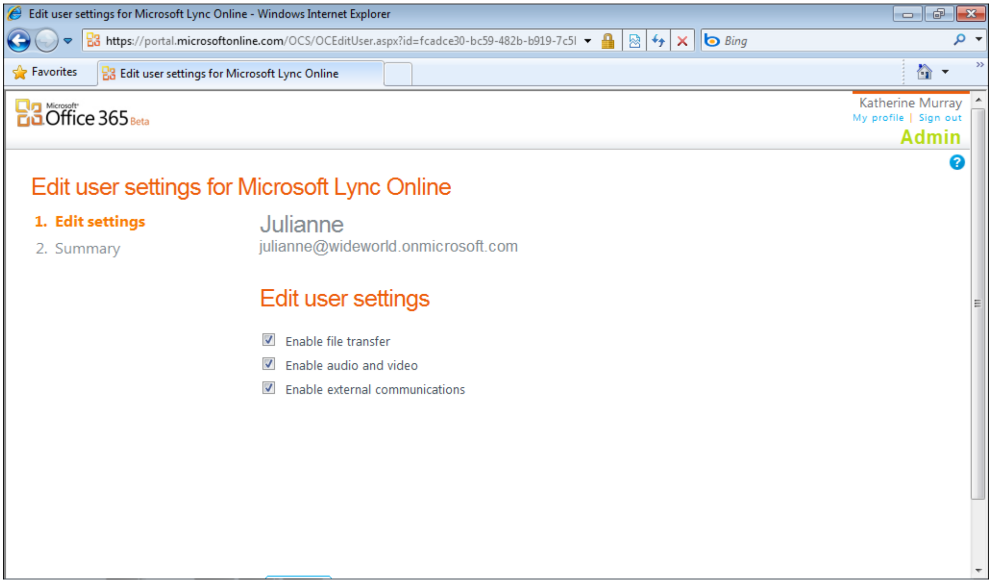
FIGURE 3-17 The Lync Online Control Panel enables you to set contact preferences, user permissions, and dial-in conferencing settings.

Modifying User Information

To change the settings for a particular user, click User Information in the Lync Online Control Panel. This link takes you to a page listing the various users on your account. Select the check box for the user with the information you want to change and click Edit User. As you can see in Figure 3-18, Lync Online displays a window showing the user's information so that you can change the settings that do the following:

- Allow the user to send files using Lync.
- Enable the user to hear audio and watch video.
- Let the user communicate with others outside your Office 365 team.

By default, all these options are enabled; to disable the capabilities, simply deselect the check box of the item you want to change.


Edit user settings for Microsoft Lync Online - Windows Internet Explorer
https://portal.microsoftonline.com/OCS/OCEditUser.aspx?id=fcadce30-bc59-482b-b919-7c5l
Bing
Favorites
Edit user settings for Microsoft Lync Online
Microsoft Office 365 Beta
Katherine Murray
My profile | Sign out
Admin

Edit user settings for Microsoft Lync Online

1. Edit settings
2. Summary

Julianne
julianne@wideworld.onmicrosoft.com

Edit user settings

☑ Enable file transfer
☑ Enable audio and video
☑ Enable external communications

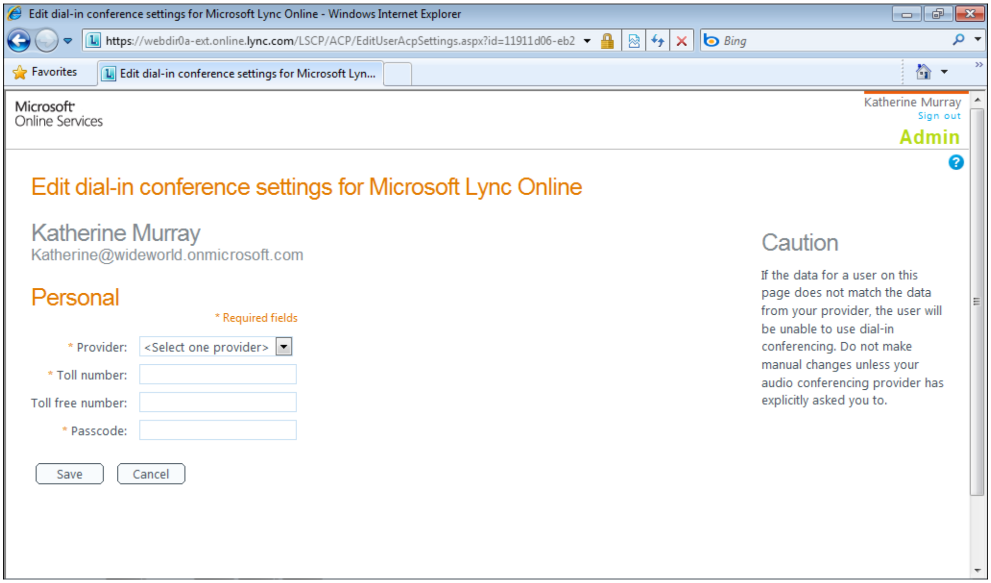
FIGURE 3-18 You can set program capabilities for individual users in Lync Online.

Setting Up Dial-in Conferencing

In the bottom half of the Lync Online Control Panel, you'll see information about dial-in conferencing. This feature enables team members to join an online meeting by calling in. Before you can set up dial-in conferencing in Lync, you need to have an account established with an audio-conferencing vendor. You can then add the information the vendor provides you—such as the call-in number and password—to each user account so that your team members can join audio conferencing when you host online meeting using Lync.

To enter the dial-in conferencing information, click the Manage link. The Edit Dial-In Conference Settings window appears. (See Figure 3-19.) You can add the dial-in conference information to a user account by clicking the user name and following these steps:

1. Click the Provider arrow, and choose the name of your provider from the list.
2. Type the call-in local number.
3. Type the call-in toll-free number.
4. Type the passcode for the account.
5. Click Save.


Edit dial-in conference settings for Microsoft Lync Online - Windows Internet Explorer
https://webdir0a-ext.online.lync.com/LSCP/ACP/EditUserAcpSettings.aspx?id=11911d06-eb2
Bing
Favorites
Edit dial-in conference settings for Microsoft Lyn...
Microsoft Online Services
Katherine Murray
Sign out
Admin
Save
Cancel

Edit dial-in conference settings for Microsoft Lync Online

Katherine Murray
Katherine@wideworld.onmicrosoft.com

Personal

* Required fields

* Provider: <Select one provider>
* Toll number:
Toll free number:
* Passcode:

Caution

If the data for a user on this page does not match the data from your provider, the user will be unable to use dial-in conferencing. Do not make manual changes unless your audio conferencing provider has explicitly asked you to.

FIGURE 3-19 Enter the audio-conferencing access numbers and passcode for each user who will participate.

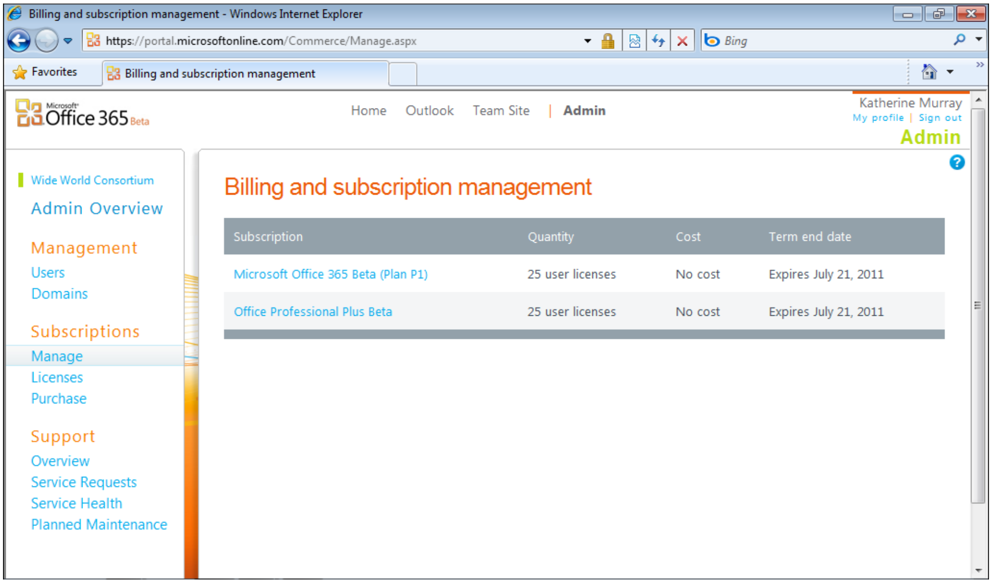
Managing Your Subscriptions

One of the beautiful things about Office 365 is that it's built on a model of efficiency. You can purchase only what you need—for only the team members you need—and keep your costs down and your support load light while moving toward the business-critical goals on your horizon. To help you manage who uses what and when they use it, Office 365 gives administrators the means to review, manage, and change the subscriptions to the services their teams use.

You'll find the tools you need for reviewing and managing subscriptions in the Subscriptions area on the left side of the Admin Overview page. Each of the three links offers you a different way to survey your Office 365 subscriptions:

- **Manage** provides you with a listing of all current subscriptions in use by your team.
- **Licenses** shows the number of licenses you have available (and are using) as part of your subscriptions.
- **Purchase** enables you to instantly add to the subscriptions you already have.

To view your team's subscriptions in Office 365, click the Manage link. The table shown in Figure 3-20 will appear. (Your subscriptions might look a bit different, of course.)


Billing and subscription management - Windows Internet Explorer
https://portal.microsoftonline.com/Commerce/Manage.aspx
Bing
Favorites
Billing and subscription management
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Admin
Wide World Consortium
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance

Billing and subscription management

Subscription	Quantity	Cost	Term end date
Microsoft Office 365 Beta (Plan P1)	25 user licenses	No cost	Expires July 21, 2011
Office Professional Plus Beta	25 user licenses	No cost	Expires July 21, 2011

FIGURE 3-20 In the Subscriptions area, you can review the subscription and licenses available in your Office 365 account.

The image in Figure 3-20 was captured during the beta program, which is why “No cost” appears in the Cost column.

When you click Licenses, Office 365 shows you the number of licenses currently in use by your team members, as well as the total number of licenses available to you. You can give users access to services by returning to the Admin Overview page and clicking Assign User Licenses in the Admin Shortcut area in the top center portion of the screen. Then click the user name and either select the check boxes of services you want to add or clear the check boxes of services you want to remove.

Tip

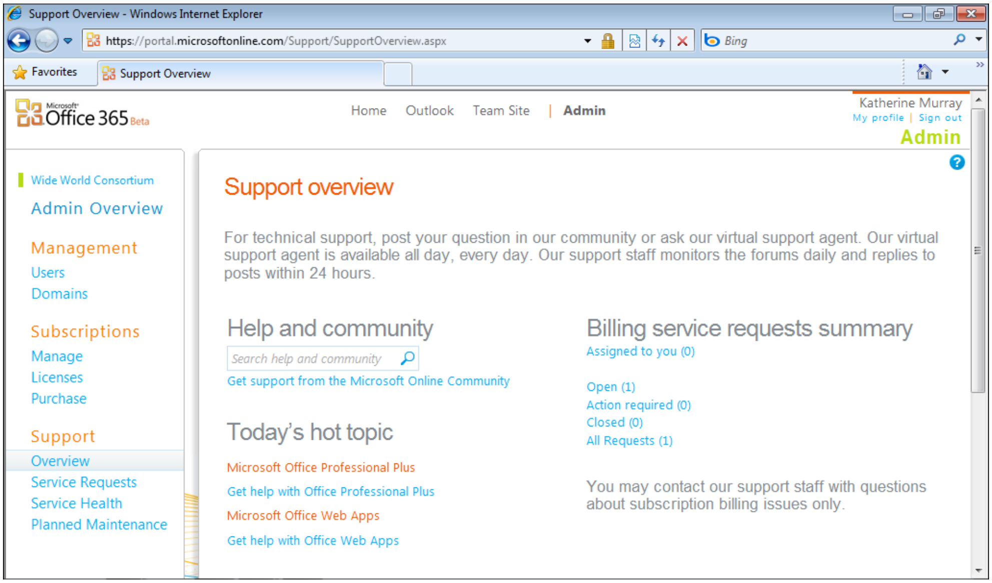
Finally, the Purchase window enables you to add to the subscriptions and licenses you have available in Office 365. This enables you to add on to what you need in real time, without requiring you to leave the site, purchase or download software, or jump through any of the hoops that installing new programs often requires. Nice!

Getting Help with Office 365

Even though Office 365 is built on what are likely to be some of your favorite and most familiar applications, learning the whole lay of the land—and creating the kind of setup you want—does involve a learning curve. Knowing this, Microsoft has created an engaged and active support community to help you get the help you need.

You’ll find access to help throughout Office 365, whether you’re working in the Admin area or not. For general help needs, you can click in the search box at the top of the right-most column and type a word or phrase that reflects what you’re looking for. You can also click any of the links on the right—including the Community links—to find additional how-tos, ask a question in the forums, or read the Office 365 blog.

On the Admin Overview page, you also have the option of displaying the Support Overview page, where you can search for help in the community, see what people are saying in the forums about the different services, and get a bird’s-eye view of your billing and service requests. (See Figure 3-21.)


Support Overview - Windows Internet Explorer
https://portal.microsoftonline.com/Support/SupportOverview.aspx
Bing
Favorites
Support Overview
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Admin
Wide World Consortium
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance
Help and community
Search help and community
Get support from the Microsoft Online Community
Today's hot topic
Microsoft Office Professional Plus
Get help with Office Professional Plus
Microsoft Office Web Apps
Get help with Office Web Apps
Billing service requests summary
Assigned to you (0)
Open (1)
Action required (0)
Closed (0)
All Requests (1)

Support overview

For technical support, post your question in our community or ask our virtual support agent. Our virtual support agent is available all day, every day. Our support staff monitors the forums daily and replies to posts within 24 hours.

You may contact our support staff with questions about subscription billing issues only.

FIGURE 3-21 The Support Overview page gives you, as an admin, a big-picture look at various help offerings.

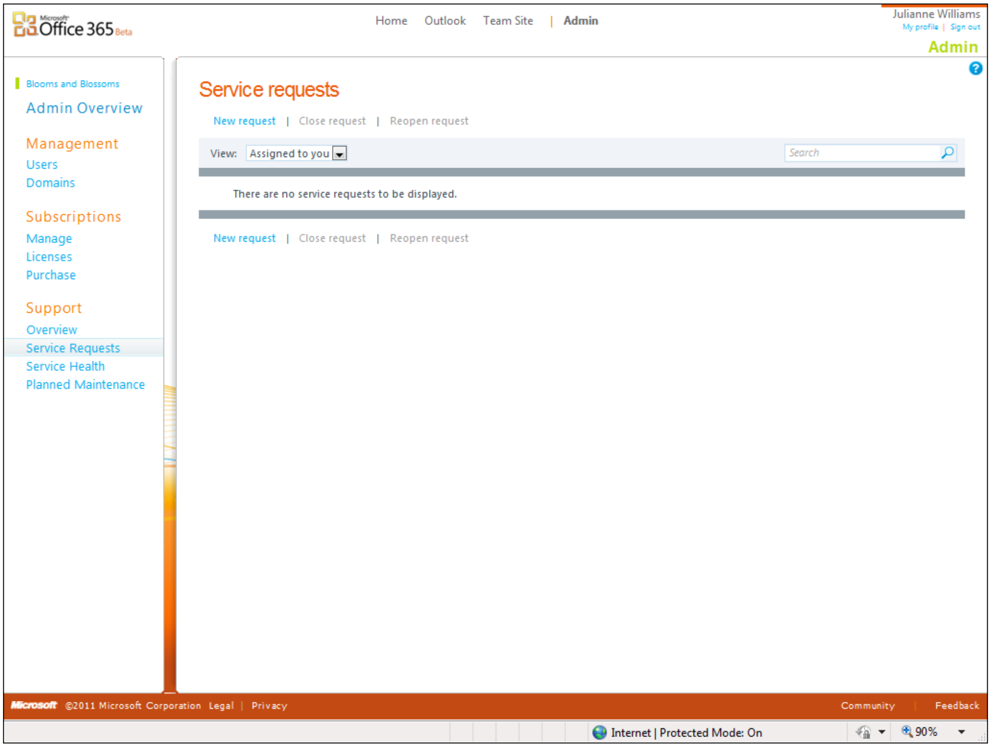
Other help tasks that fall to you as the administrator involve creating service requests for those times when you need professional assistance with the site, and checking overall system status to ensure there are no interruptions in service. These tasks are very important when you've got people logging in from all over the world and the web is your primary means of connection.

Creating Service Requests

Anyone who has ever spent time on the phone with technical support knows this universal truth: it is not fun.

First, you're probably frustrated because the software isn't working the way it should. Second, you probably have a deadline hanging over your head, which adds pressure. Third, as an administrator, you're at least in some capacity the one who has to figure this stuff out. So when you're having trouble with a program or you have a question you or your team members can't find the answer to, what do you do?

Begin by clicking Admin in Office 365 to access the Admin Overview page. Then click Service Requests in the Support area on the left side of the screen. In the Service Requests window, click New Request. (See Figure 3-22.) This opens a new Service Request window so that you can fill in the information you need in order to communicate your problem clearly to tech support.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Julianne Williams
My profile | Sign out
Admin
Blooms and Blossoms
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance
Service requests
New request | Close request | Reopen request
Search
New request | Close request | Reopen request
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback
Internet | Protected Mode: On
90%

View: Assigned to you

There are no service requests to be displayed.

FIGURE 3-22 You can start a new service request by clicking Service Requests in the Support area of the Admin Overview page.

Here are the steps to get started filling out the service request form:

1. In the Identify Issue window, identify the problem as clearly as you can. Click the Service arrow, and choose the service you are having trouble with (Exchange, Lync, or SharePoint).
2. Click the Service Area arrow, and choose the category that reflects what you're having trouble with.
3. Click the Problem Description arrow, and choose your questions or issue from the list.
4. Click Operating System, and choose the operating system running on your computer. Similarly, choose the Office version and browser you use.
5. Click Next.

6. Enter a title that gives the technician an idea of the problem you're having.
7. Click in the Description area, and describe the problem fully.
8. In the Error Message area, provide any error messages you receive.
9. Click the arrow to the right of Have You Reproduced This Problem On More Than One Computer?, click either Have Not Tried, No, or Yes to let the technician know whether the problem exists on only one system or throughout your site.
10. Click Next.

It's often helpful for tech support personnel to see what you see when they are evaluating a problem you're having. You can capture a screen shot of any error message or problem you see on-screen and send the image to the technician. To capture the image, you can simply press Prt Sc while the problem is displayed on the screen and then paste the picture into your favorite image editor (such as Windows Paint); then save the file. Attach the file to your service request in the Attach File page by clicking the Attach A File link. Navigate to the file you want to attach, click Open, and when prompted, click Yes to affirm that you do want to attach the file.

The file appears in the center of the File Attachments page. You can remove the attachment if you'd like by clicking the Remove link that appears to the right of the attached file.

Tip

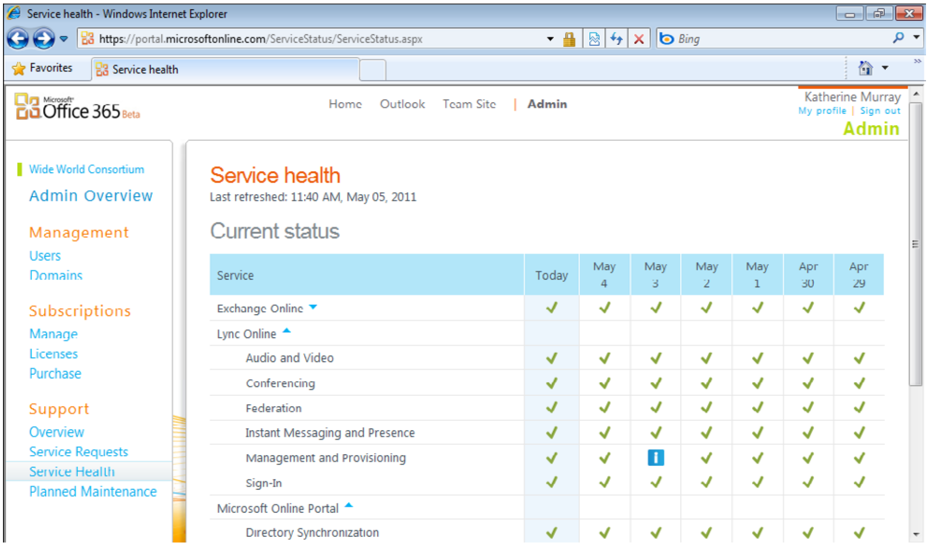
Finally, send your service request to Microsoft by clicking the Submit button. Office 365 displays a Confirmation window, providing a summary of your request and providing a reference number. Click Finish to return to the Service Requests page.

Checking System Status

When you depend on a web-based service to provide connectivity to your team members and access to your programs and files, making sure the service is up and running correctly is a major concern. Recognizing this, Office 365 keeps you clued in about challenges and updates in the Office 365 system. If you're having trouble accessing a service, for example, your first step in solving the problem is to check the status of the overall system to make sure there aren't service glitches somewhere along the way.

To check the system status of Office 365, follow these steps:

1. Click Admin to display the Admin Overview screen.
2. In the Support area on the left side of your screen, click Service Health. The Service Health screen shows you the status of all the different services running in Office 365. (See Figure 3-23.)
3. Scroll down the list to check the status of all services.
4. Click the blue-and-white information icon to display the details about a particular service interruption.


Service health - Windows Internet Explorer
https://portal.microsoftonline.com/ServiceStatus/ServiceStatus.aspx
Bing
Favorites
Service health
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Admin
Wide World Consortium
Admin Overview
Management
Users
Domains
Subscriptions
Manage
Licenses
Purchase
Support
Overview
Service Requests
Service Health
Planned Maintenance

Service health

Last refreshed: 11:40 AM, May 05, 2011

Current status

Service	Today	May 4	May 3	May 2	May 1	Apr 30	Apr 29
Exchange Online	✓	✓	✓	✓	✓	✓	✓
Lync Online							
Audio and Video	✓	✓	✓	✓	✓	✓	✓
Conferencing	✓	✓	✓	✓	✓	✓	✓
Federation	✓	✓	✓	✓	✓	✓	✓
Instant Messaging and Presence	✓	✓	✓	✓	✓	✓	✓
Management and Provisioning	✓	✓	i	✓	✓	✓	✓
Sign-In	✓	✓	✓	✓	✓	✓	✓
Microsoft Online Portal							
Directory Synchronization	✓	✓	✓	✓	✓	✓	✓

FIGURE 3-23 Check the system status of Office 365 to make sure that all services are up and running properly.

If you want to find out when the software will be going through planned maintenance upgrades, click Planned Maintenance on the left side of the screen. You'll be able to see when the next maintenance activities are scheduled, read details about the activity, and see the date and time the event is scheduled. This information will help you avoid scheduling site events that might be affected by the changes. For example, you might want to avoid scheduling an online meeting using Lync at the precise time the Lync service is set to undergo program maintenance.

What’s Next

In this chapter, you discovered the ins and outs of administration—at least as they pertain to your Office 365 account. You learned how to set up the space so that the people you want to have access can log in; you set permissions; you set up the various programs the way you want them to be used by your team members. You also found out how to manage service subscriptions and licenses and discovered how to check system status and get help. The next chapter starts Part II, “Teamwork in the Cloud,” and shows you how you can get things moving on a team level in Office 365.

2

Teamwork in the Cloud

NOW THAT you’ve set up an Office 365 account, created user accounts for your team members and assigned permissions (if you’re the administrator, anyway), the real fun begins! This part of the book shows you how to get your team working together by using various features of Office 365. The first chapter gives you a kind of appetizer plate of different services to sample, and the remaining chapters in this part show you specifically how to create a team site and begin sharing files of all types.

CHAPTER 4

What Your Team Can Do with Office 365

IN THIS CHAPTER:

- Starting with the end in mind
- Creating a shared space
- Sharing calendars securely
- Translating content on the fly
- Making instant contact with team members
- Holding online meetings
- Broadcasting presentations online
- Creating and modifying a website

OK, YOU'VE GOT your Microsoft Office 365 account set up, and you've arranged for team members to get into the site. Now it's time to get inspired. Whether you are putting together a team to work on a specific project—like planning an amazing special event—or a team that will collaborate over time on many projects, creating a workspace your team can share and thinking about various things you'd like to accomplish together are two important steps in putting together a successful team.

This chapter discusses what you need to do to help your team be successful. Envisioning the type of team environment you'd like to create is a good place to begin. You'll be doing more brainstorming than actual site creation in this chapter—the specific steps for creating your shared worksite is the topic of Chapter 5, "Creating Your Team Site with SharePoint Online." This chapter shows you a variety of tasks you might want to accomplish with your team, ranging from sharing files to translating documents to broadcasting presentations and more. Depending on the nature of your work, you might need some features more than others—and this chapter will help you think through the tasks for creating just the kind of group experience you hope your team will have.

Starting with the End in Mind

Before you begin setting things up online to give your team the tools they need to get busy, it's a good idea to think through the goals for your team and envision the process—and benchmarks—you can follow to help the team reach those goals successfully. Envisioning the overall direction—even if you will be inviting the team's input on that—is a good way to set the foundation for the team's work. Here are some questions to get you started:

- What is the long-term goal of your team?
- When do you want to accomplish the goal?
- Will you have specific roles for various members of your team (designer, writer, editor, project manager, and so on)?
- Will you work collaboratively on specific pieces (for example, will an editor and a designer need to have access to the same document at the same time)?
- Will you have team meetings at regular intervals (weekly, biweekly, or some other regular schedule)?

Thinking through the ways in which your team will assign tasks, report on progress, communicate one-to-one and to the entire team, and find and work with important files will help the team work together more smoothly in Office 365. The rest of this chapter offers specific techniques you can use to prepare your team space to be a hive of productive activity.

BECOMING A TEAM

Throw a group of people together and give them a common goal and what do you have? A team.

How well that team works together, however, might have a lot to do with where the team is in its natural life cycle. In the 1960s, psychologist Bruce Tuckman came up with a phrase to describe the way teams come together. He described four stages—forming, storming, norming, and performing—as the process by which the team gets organized and begins to work together productively. Here's a quick look at the four stages of the process:

- **Forming** In this first stage team members are just getting to know one another. They might be a little anxious, or very polite, wondering what will be expected of them and how the other team members will behave. The leader's role is important in this stage because it's the most clearly defined role and helps the rest of the group feel less anxious about what's to come.

- **Storming** In this stage, people are starting to get to know each other and personalities start emerging. The leader might feel a little challenged as people jockey for position and assert what they do best. Storming can bring out personality clashes and struggles over authority. People might push back on deadlines, "forget" to do important tasks, or rebel against the group in others ways. Things might just not be a whole lot of fun as many skirmishes and struggles rise to the surface.
- **Norming** As a result of the tumultuous nature of the storming stage, norming brings a sense of organizing for the team. The group begins to establish norms that enable members to know how and when things are submitted, who is in charge, what the reporting will look like, who to go to with problems, and so on. In the norming stage, team members are also getting to know each other better and might turn to each other for help with tasks or questions. As a result, the team begins to feel more like a team and starts to build trust and cooperation.
- **Performing** This stage is the productive phase of the team. With the earlier stages out of the way and with the benefit of the organizing that went on in the norming stage, performing enables the team members to do what they need to do to meet the group goals.

Tuckman later added a fifth stage, called "adjourning," in which the group finishes its work, celebrates its successes, and disbands. Note that not all teams go through this process exactly this way—some skip steps, and some seem to get stuck in a particular stage and never get out of it. It's an interesting paradigm to keep in mind as you watch your own team come together, though, and it can be reassuring if you find your team in the tumultuous storming stage.

Creating a Shared Space

One of the challenges of working in the cloud is that, well, you're working in the *cloud*. It's a bit more difficult to look at someone across a desk and talk about something face to face (although you can use Lync Online and your webcam for some real facetime). Your weekly staff meetings in which each person gives an update of his or her part of the project are harder to pull off. People might be in or out of their office—how do you know?

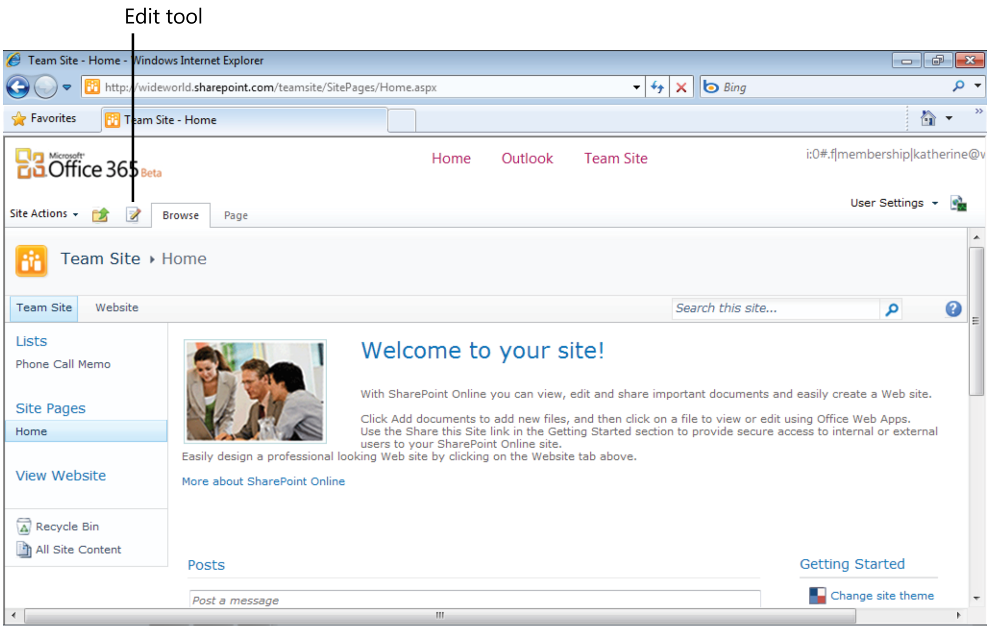
Although working in the cloud poses particular contact challenges, it also offers many great benefits. The first advantage, of course, is that you can create a shared workspace where your team can access the files they need to complete their work. They can also use familiar programs, thanks to Office 365, and log in and complete their tasks whenever it's convenient.

Some additional benefits Office 365 offers help bridge the gap between your "real world" needs and your productivity goals. You can find out when others are online—there's the possibility for that "face-to-face" meeting—by using the presence technology available through Lync Online. And you can create a shared workspace—the familiar board room table—by designing a SharePoint Online site where you can post events, comments, files, and more.

Displaying the Team Site

SharePoint Online is the place where you'll find everything you need to create your shared site. To find SharePoint Online in Office 365, follow these steps:

1. Log in to Office 365 with your user name and password.
2. Click on the Team Site tab at the top of the window. The SharePoint Online team site appears, ready for you to modify things to suit your needs. (See Figure 4-1.)


Edit tool
Team Site - Home - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/SitePages/Home.aspx
Bing
Favorites
Team Site - Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
i:0#.f|membership|katherine@v
Site Actions
Browse
Page
User Settings
Team Site ▸ Home
Team Site
Website
Search this site...
Lists
Phone Call Memo
Site Pages
Home
View Website
Recycle Bin
All Site Content
Posts
Post a message
Getting Started
Change site theme

Welcome to your site!

With SharePoint Online you can view, edit and share important documents and easily create a Web site.

Click Add documents to add new files, and then click on a file to view or edit using Office Web Apps. Use the Share this Site link in the Getting Started section to provide secure access to internal or external users to your SharePoint Online site. Easily design a professional looking Web site by clicking on the Website tab above.

More about SharePoint Online

FIGURE 4-1 You can customize the SharePoint team site to include the type of content you want to share with your team.

Click the Edit tool (located just to the left of the Browse tab) to display editing mode. The ribbon at the top of the page changes to include a set of editing tools you can use to add pages, change the page layout, and add site elements, such as tables, pictures, video clips, document libraries, a calendar, and other web parts.

See Also You'll learn more about customizing your team site by adding web parts and other elements in Chapter 5.

PLANNING THE WORK OF YOUR TEAM

Knowing in advance what you want your team to accomplish will have some bearing on the types of elements you add to your team site. I'll cover this in more detail in Chapter 5, when you actually create the team site, but thinking through what you want to accomplish will plan the overall work of your team.

Here are a couple of ideas along this line:

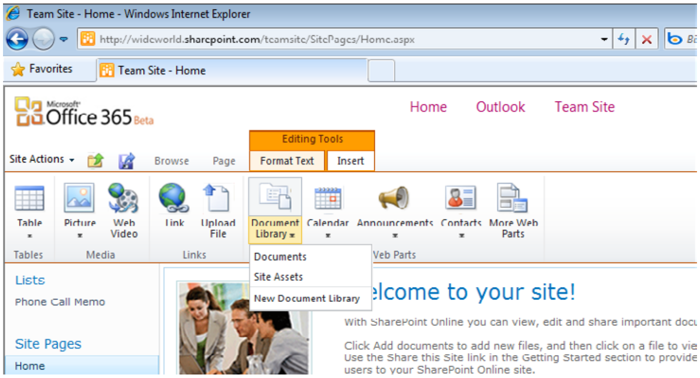
- If your team is coming together to do a specific project—for example, the launch of a new exhibit—you might need to plan to include the following things in the site: shared calendars with regular team meetings; a document library for storing marketing materials and designs; announcements so that team members can see when new items are posted or updated; a way to view overall deadlines and your progress toward the goal; and online meetings with presentations and chat, to make sure everyone is headed in the same direction.
- If your team is working remotely over the long haul—perhaps you are a small business with offices on a couple of continents—your needs for your team site might be a little different. You still would benefit from a shared calendar and regular meetings, but you might also create document libraries for each member of the team, a public site you all work on, announcements and tasks, and other web parts that help you socialize as well as complete business-critical tasks independently and as a team.

Whether your team is working together for a short time or for an indefinite period, be sure to include the basics—calendar, document library, and announcements—as you start out. You can always add to the features of the site as you go along, when you notice what's missing that might make your teamwork a little smoother.

Working with Document Libraries

One great use of your team site is to share documents you all need as you work on your shared project. You can create multiple document libraries in SharePoint Online and store Word documents, pictures, media clips, and more—whatever your team needs access to.

You'll find what you need for creating a document library when you click the Edit tool in the Team Site and click the Insert tab in the Editing Tools tab. Click Document Library to display the tools for creating and working with libraries. (See Figure 4-2.)


Team Site - Home - Windows Internet Explorer
http://wideworld.sharepoint.com/teamsite/SitePages/Home.aspx
Favorites
Team Site - Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
Table
Picture
Web Video
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Web Parts
Documents
Site Assets
New Document Library
Lists
Phone Call Memo
Site Pages
Home

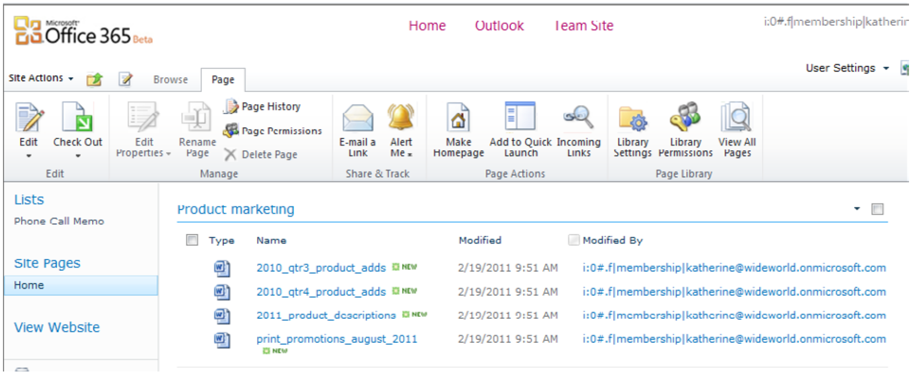
elcome to your site!

With SharePoint Online you can view, edit and share important docu

Click Add documents to add new files, and then click on a file to vie
Use the Share this Site link in the Getting Started section to provide
users to your SharePoint Online site.

FIGURE 4-2 Click the Insert tab in the Editing Tools, and choose Document Library and New Document Library to create a new place to store shared files.

Choose New Document Library to create the new space for your shared team files. Type a name for the new library, and click OK; Office 365 then inserts the new library on the current page. You can then click the Add Document link and upload the files you need to the new document library. (See Figure 4-3.)


Microsoft Office 365 Beta
Home
Outlook
Team Site
i:0#.f|membership|katherir
User Settings
Site Actions
Browse
Page
Edit
Check Out
Edit Properties
Rename Page
Page History
Page Permissions
Delete Page
E-mail a Link
Alert Me
Make Homepage
Add to Quick Launch
Incoming Links
Library Settings
Library Permissions
View All Pages
Edit
Manage
Share & Track
Page Actions
Page Library
Lists
Phone Call Memo
Site Pages
Home
View Website

Product marketing

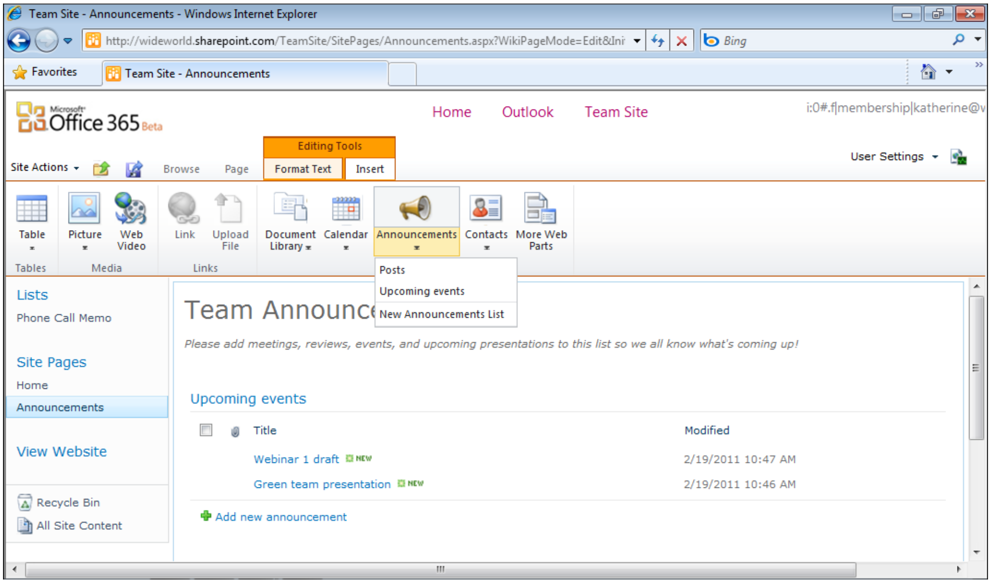
Type	Name	Modified	Modified By
	2010_qtr3_product_adds NEW	2/19/2011 9:51 AM	i:0#.f|membership|katherine@wideworld.onmicrosoft.com
	2010_qtr4_product_adds NEW	2/19/2011 9:51 AM	i:0#.f|membership|katherine@wideworld.onmicrosoft.com
	2011_product_descriptions NEW	2/19/2011 9:51 AM	i:0#.f|membership|katherine@wideworld.onmicrosoft.com
	print_promotions_august_2011 NEW	2/19/2011 9:51 AM	i:0#.f|membership|katherine@wideworld.onmicrosoft.com

FIGURE 4-3 After you upload files to the document library, other team members can access and share the files.

Tip

Creating a Space for Announcements

Another thing you might want to do right off the bat with your team site involves creating a space where your team can share upcoming announcements related to your shared work. You might post news about upcoming meetings, post the results of surveys, or share ideas you want to discuss with the team. Like everything else in SharePoint Online, your announcement lists are completely customizable and you can add multiple lists to share different types of information—whatever best fits your team. (See Figure 4-4.)


Team Site - Announcements - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Announcements.aspx?WikiPageMode=Edit&Ini
Bing
Favorites
Team Site - Announcements
Office 365 Beta
Home
Outlook
Team Site
i:0#.f|membership|katherine@v
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Table
Picture
Web Video
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Posts
Upcoming events
New Announcements List
Lists
Phone Call Memo
Site Pages
Home
Announcements
View Website
Recycle Bin
All Site Content
Team Announce

Please add meetings, reviews, events, and upcoming presentations to this list so we all know what's coming up!

Upcoming events

Title	Modified
Webinar 1 draft NEW	2/19/2011 10:47 AM
Green team presentation NEW	2/19/2011 10:46 AM

Add new announcement

FIGURE 4-4 Create team announcements to let everybody on the team know what's next on your task list.

WHAT ELSE CAN YOU DO IN SHAREPOINT?

This section has given you a few ideas for the types of things you might want to do first with your SharePoint team site, but you can add all kinds of elements and customize the look and feel of the site to your heart's content. You can even create a public website (not simply a team site) where you share your creations with the world. Some other tasks you might want to do in SharePoint include these:

- Add files.
- Change page permissions.
- Change the site layout.
- Set alerts so that you know when content is updated or added.
- Rename the site.
- Add a site description.
- Customize the HTML for the site.
- Add pictures and tables.
- Create a new contacts list.
- Check files in and out.
- Add a calendar.
- Add special web parts to increase the functionality of the site.
- Edit the site in SharePoint Designer.

Sharing Calendars Securely

One of the challenges to working with a group of people you rarely see is that it can be tough to get everybody in the same place at the same time. For that reason, being able to share calendars so that your colleagues can see at a glance whether you're available for a team meeting is an important way to stay in touch.

With Office 365, you can easily manage your calendar and share it with other members on your team. (See Figure 4-5.) The appointments and meeting announcements you save and send are secure in your cloud environment while still being easily accessible to those with the permissions to share your information. You can also change your permissions at any time, so if you have team members who come and go, you can easily add others to your share list.

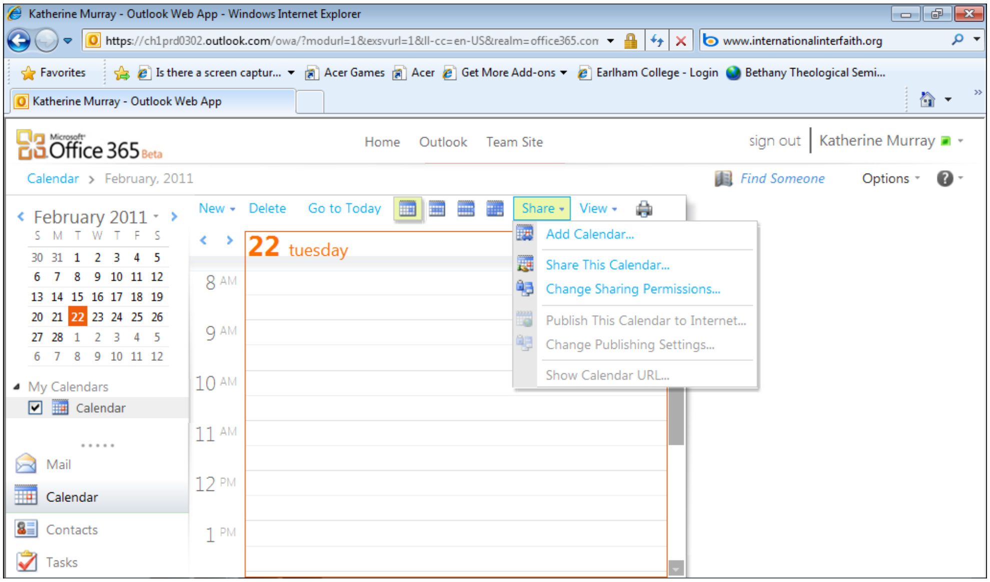

Katherine Murray - Outlook Web App - Windows Internet Explorer
https://ch1prd0302.outlook.com/owa/?modurl=1&exsvurl=1&ll-cc=en-US&realm=office365.con
www.internationalinterfaith.org
Favorites
Is there a screen captur...
Acer Games
Acer
Get More Add-ons
Earlham College - Login
Bethany Theological Semi...
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Calendar > February, 2011
Find Someone
Options
February 2011
New
Delete
Go to Today
Share
View
22 tuesday
Add Calendar...
Share This Calendar...
Change Sharing Permissions...
Publish This Calendar to Internet...
Change Publishing Settings...
Show Calendar URL...
My Calendars
Calendar
Mail
Calendar
Contacts
Tasks

FIGURE 4-5 You can easily share your calendar in a secure environment using Office 365.

SCHEDULING FOR TEAM SUCCESS

So how often do you need to schedule team meetings, group meetings, project meetings, and post-meeting meetings? One of the nice things about working in the cloud is that you can avoid being meeting-ed to death, which is sometimes hard to avoid in the face-to-face business culture.

The number of times you meet—and the topics you meet about—will depend in part on the type of team you're creating, what your focus is, and who your leaders are. Truly collaborative teams might enjoy getting together for some creative time and status updates once a week or so. Teams that have a top-down management style might be more regimented, with mandatory team meetings once a week at a specific time. Of course some teams—especially high-performing sales teams—meet each morning to go over the plan for the day. So it's your call—and your need—that should determine how often you meet with your team.

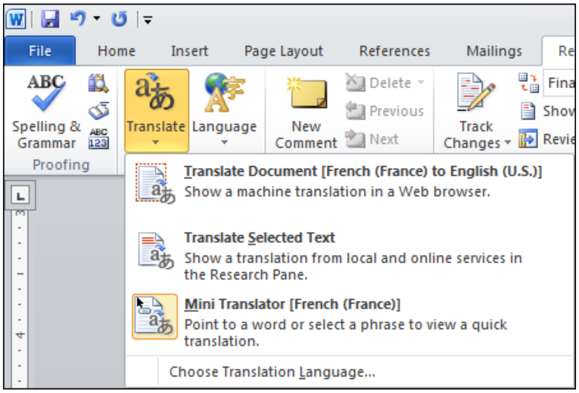
Whatever timeframe you choose, try to be consistent with your meetings, at least while your group is going through the forming and storming stages. Once you get to norming, the meetings will sort themselves out, but having some kind of structure to hold to—such as, "We'll have a team meeting every Wednesday at 9:00 a.m. EST"—can help the group begin to get organized.

Tip

Translating Content on the Fly

When you work with colleagues who might be located anywhere on the planet, you might encounter language issues now and again. It's one of the realities of the global marketplace—translation tools are a feature you really do need in your cloud computing toolkit. Translation tools are actually part of Office 2010—in Word, PowerPoint, and Excel—and you'll be able to use them in Office 365 with teammates near and far. Using the translation features, you can easily translate words and phrases as you work on documents or converse with colleagues anywhere in the world.

For example, when you open a Word document in Office 365, click Edit in Word. The file opens in the familiar Word 2010 interface. You can then turn on the Mini Translator tool by clicking the Review tab and clicking Translate in the Language group. Click Choose Translation Language, click the Translation To arrow, and choose the language you want to use from the list. Click OK, and click Translate once again; this time click Mini Translator to turn the feature on. (See Figure 4-6.) Now you can highlight a word or phrase while you work and the Mini Translator tool will show you the translation in real time (and even pronounce it for you if you click Play). Nice!



Translate Document [French (France) to English (U.S.)]
Show a machine translation in a Web browser.

Translate Selected Text
Show a translation from local and online services in the Research Pane.

Mini Translator [French (France)]
Point to a word or select a phrase to view a quick translation.

Choose Translation Language...

FIGURE 4-6 Select the language you want to translate to, and click the Mini Translator to turn on the translation feature.

MAKING SURE LANGUAGE ISN'T A BARRIER

If your team spans continents and cultures, it's a good idea to address language challenges right off the bat. If you're creating material for public use, you might want to strive for a standard that is easy to translate into different languages, which means you need to avoid local phrases that won't be easily translated later.

You can also have a conversation with your team about preferred languages and how you can all best understand each other, in email, online, and on the phone. You might choose one common language that most of your team members can use fluently, or default to English if that's a commonly known language.

If your team members use words or phrases you don't understand, ask them what they mean—this is much better than guessing or implying that you understand when you really don't. You might miss something important that way!

The Mini Translator tool offers translations for nearly 30 different languages, and additional languages are being added all the time. So use the Mini Translator regularly to convert words and phrases you don't recognize into content you can use.

Making Instant Contact with Team Members

Contact has been getting easier for most of us who work with technology over the last, oh, say 10 years. We used to write and deliver memos, make phone calls, and schedule meetings. Today we send email messages or—if that's too slow—we can send instant messages to others who are available online at the same time we are.

Instant messaging is nothing new, of course. Windows Live Messenger and other instant messaging programs have been around for years. The thing that's new is the ability to communicate seamlessly with team members from within your work environment. Early on, instant messaging was a bit of a challenge to secure, and large corporations most often just disallowed the use of instant messaging while they figured out the security piece. Now in Office 365, you can use Lync Online to easily and securely chat with colleagues in real time without worrying about who might be intercepting the messages you send. It's safe and secure and done within the Office 365 environment.

ONE-TO-ONE AND TEAM-BASED COMMUNICATIONS

When your group is just forming, you might be concerned that too much one-to-one conversation through instant messaging and email might leave the rest of the group out. Will the team become a *team* if people pair up and leave everyone else out?

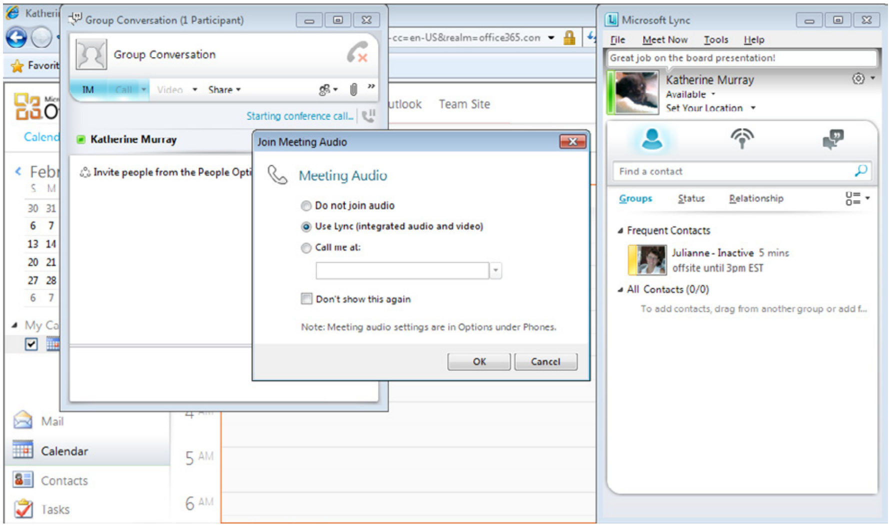
Luckily, you can invite more than one person to instant messaging conversations, and you can also keep a log of your conversation so that you can share it with the full team later if you choose.

You can help the entire team connect and communicate by scheduling online team meetings regularly during the forming and storming stages. Beyond that, don't worry too much about one-to-one communications unless you're concerned that team members aren't getting their tasks done (and that can be an item on the next team meeting agenda).

Holding Online Meetings

Especially if your team is scattered all over the globe, being able to assemble everyone in one place at a given time is really important. With Office 365, you can use the Calendar tool to schedule your team meetings and Lync Online to easily meet online and make sure everyone is on the same page.

When you click Meet Now by clicking the Options button in the top right corner of the Lync window, Lync displays the Group Conversation dialog box and asks you to choose the type of audio you want to use for the meeting. By default, Lync uses its own integrated audio and video. (See Figure 4-7.) You can also ask participants to call you at a number you specify if you have a particular conference calling number you prefer to use.


Group Conversation (1 Participant)
Group Conversation
IM
Call
Video
Share
Katherine Murray
Invite people from the People Opti
utlook
Team Site
Calend
Febr
My Ca
Mail
Calendar
Contacts
Tasks
5 AM
6 AM
Join Meeting Audio
OK
Cancel
Microsoft Lync
File
Meet Now
Tools
Help
Find a contact
Groups
Status
Relationship
Frequent Contacts
All Contacts (0/0)

Starting conference call...

Meeting Audio

○ Do not join audio
● Use Lync (integrated audio and video)
○ Call me at:
☐ Don't show this again

Note: Meeting audio settings are in Options under Phones.

Great job on the board presentation!

Katherine Murray
Available
Set Your Location

Julianne - Inactive 5 mins
offsite until 3pm EST

To add contacts, drag from another group or add f...

FIGURE 4-7 You can use Microsoft Lync to meet online with your team—either at your set meeting time or on the fly.

CALL IT A GROUP

Team meetings can help your team members feel like they're in sync—or they could be boring ho-hum meetings that members resent taking the time to attend. For best results, keep your meetings short and sweet—and keep them positive and focused.

Members will enjoy participating in something they feel good about or something that helps them solve problems they are experiencing. So you might want to set up your team meetings to follow a general process like this:

- Welcome to the group
- Team successes from last week
- Team focus for this week
- Individual reports
- Something funny (or a tip or positive customer experience)
- Goodbye for now

This whole process might take only 15 minutes, but if you follow it regularly, you'll get the work of the team done, celebrate some successes (which builds momentum), and help people feel like it was a good use of their time. Not bad for a little time in the cloud.

Broadcasting Presentations Online

The online broadcasting capabilities of PowerPoint 2010 is another big change that was part of Office 2010. But now, as an Office 365 user, you have the benefit of broadcasting presentations live to your team and your clients—no matter where in the world they happen to be. You can simply prepare your presentation with PowerPoint Web App (available in Office 365) and then prepare it for presenting online. This involves creating a web link you send in an email to others so that they can view the presentation live in their web browser. One of the present limitations of this feature is that any audio or video you've added to the presentation won't be visible over the web; but you can set up a conference call in addition to the presentation and talk your team members through it slide by slide.

Tip

WHAT MAKES A GREAT ONLINE BROADCAST?

The most important thing to keep in mind about an online broadcast you're preparing is that you want your message—and your goal—to be as clear as possible. Here are a few ways you might use the broadcasting feature with your team:

- You want to show everyone how to use the team site.
- You are sharing design options for your new product packaging.
- You want to share a presentation you plan to give at an upcoming company meeting.

- You want to invite team input on a presentation about your work.
- You are learning and sharing research about a specific topic that affects your work together.

A good online broadcast takes into account that the audience members have other things to do—and might be doing them while you think they're watching your presentation! So make sure that the presentation is engaging—presenting information very clearly and pausing at key points for audience questions or interaction.

Be sure to use an audio component—whether it's a traditional conference call or a call you set up through Lync Online—so that your team members can share their own ideas and ask questions as needed.

You can also prepare and share handouts and other collateral materials by posting them in your team document library in SharePoint Online or by emailing them to the team before the broadcast begins.

Creating and Modifying a Website

Not only does SharePoint Online enable you to create a team site where you can create document libraries, share announcements, set up meetings, and more, but it gives you the means to create a public-facing website that shares your information with the world. Having the team site—which is invisible to the public—and the public site together in one tool is a real time-saver and can help you focus clearly on the different tasks and communications you need to both manage your team and present your wares to the world.

You'll find the link for viewing your public website in the Website area at the bottom of the Home page. To edit the public website, however (not simply view it), you need to click Admin at the top of the Office 365 page and scroll down to the Website area. Click the Edit Website link to begin working with the content on your pages. By default, your website includes five pages: Home, About Us, Contact Us, Site Map, and Member Login. You can then customize the content on the page, add new pages, change the site theme or layout, or edit the website as you see fit. (See Figure 4-8.)

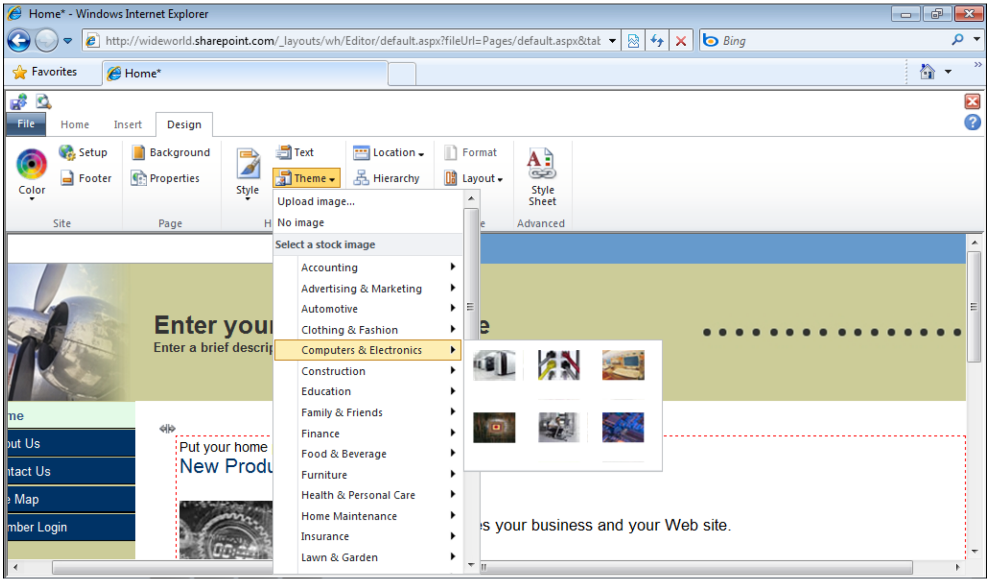

Home* - Windows Internet Explorer
http://wideworld.sharepoint.com/_layouts/wh/Editor/default.aspx?fileUrl=Pages/default.aspx&tat
Bing
Favorites
Home*
File
Home
Insert
Design
Color
Setup
Footer
Site
Background
Properties
Page
Style
Text
Theme
Location
Hierarchy
Format
Layout
Style Sheet
Advanced
Upload image...
No image
Select a stock image
Accounting
Advertising & Marketing
Automotive
Clothing & Fashion
Computers & Electronics
Construction
Education
Family & Friends
Finance
Food & Beverage
Furniture
Health & Personal Care
Home Maintenance
Insurance
Lawn & Garden
Enter your
Enter a brief descrip
Put your home
New Produ
s your business and your Web site.
me
ut Us
tact Us
Map
mber Login

FIGURE 4-8 You can easily apply new themes and layouts to the website you create for your team.

TIP

See Also You'll learn all about customizing the content in the SharePoint Online website in Chapter 5.

What's Next

This chapter focused on some of the tasks you can start with as you begin to pull your team together. The next chapter goes into greater detail about customizing your team site in SharePoint Online. You'll learn how to tailor the content just the way you want it for your team and create a site you'll share with the world as well.

CHAPTER 5

Creating Your Team Site with SharePoint Online

IN THIS CHAPTER:

- Planning your team site
- Creating a simple team site—fast
- Putting some thought into the team site design
- Choosing a site theme
- Changing the text layout of your page
- Posting an update
- Adding and formatting pictures
- Adding a new page
- Entering and editing content
- Adding web parts
- Sharing your site

SHAREPOINT ONLINE is likely to be the heart of your cloud operation, helping you stay in touch with the team, share documents, post announcements and updates, and manage the various tasks that will be part and parcel of your projects. You do, after all, need a *space* where your team can come together in some fashion and share what you're working on.

The basic SharePoint Online site provided for you in Office 365 is just the beginning—you can customize the site to include all sorts of tools and web parts that suit the type of information you need to manage and the results you want to create. You can also use SharePoint Online to create a forward-facing website that enables you to share your work with the world.

The point is to create a site that looks and feels like a home base for you and your team—a virtual office space where you can find the files you need, chat with your colleagues over coffee, get updates on important tasks easily, and feel you're in sync with the group. The last chapter introduced you to some of the tasks you might want to accomplish in your team site; this chapter shows you how to add text and images and rearrange the furniture so that it fits just the way you and your team like to work.

Planning Your Team Site

If you've ever been on any kind of team, one fact you know to be true is that no two teams are created equal. Each team has its own personality—some are friendly, some are focused, some are all business. Teams have different goals—such as preparing for a big event, writing the curriculum for a new training project, or producing an annual report. Teams also have different kinds of leadership, ranging from a kind of rotating, team-based leadership to a top-down style with a "my way or the highway" type of person at the head.

The type of site you create in SharePoint should reflect the work style that fits your team best. If you like to keep everybody in the loop about upcoming deadlines and recently completed tasks, make sure you display announcements and updates in a prominent place. If you just want to get down to business and provide a common space for files you all use, you can add a document library right there on the home page of your team site.

Creating a Simple Team Site—Fast

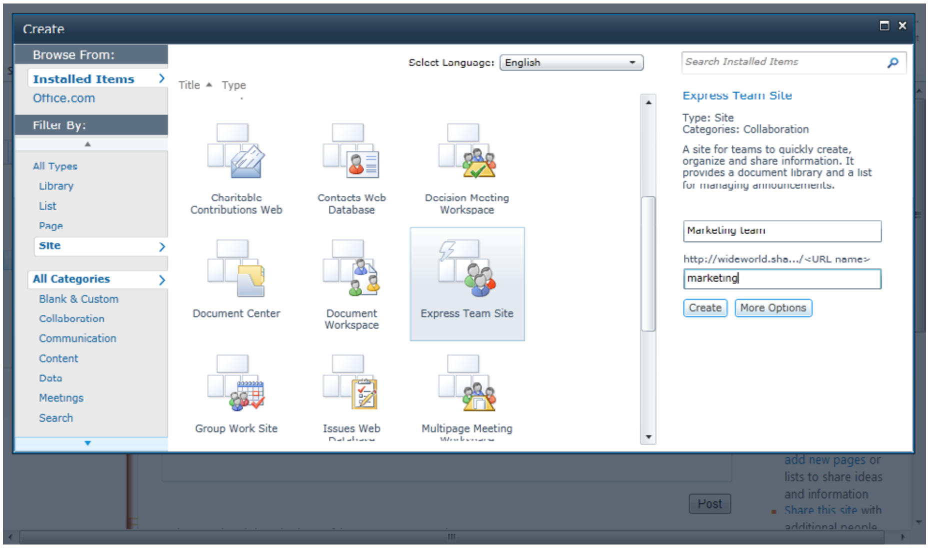
You can spend a lot of time—in fact, there are whole books written about—designing a SharePoint site to reflect just the types of information you want it to offer. But designing your site can be as simple as throwing some words and pictures on a page, if that's what you choose. If you just want a shared space to post information—and your team will be together only for a short time—that amount of effort might be just right for what you need. If this is what you're looking for, and you are an Admin user, you can create an Express Site in SharePoint Online.

The fastest way to create a functional SharePoint site is to use the Express Site options. This enables you, for example, to quickly create and share information about the project your team is working on. This site is based on a ready-made template that includes a document library, where you can store your files, and an announcements list.

To create an Express Site, follow these steps:

1. In Office 365, click Team Site at the top of the screen.
2. In the team site, click the Site Actions arrow in the top left of the ribbon.
3. Choose More Options.
4. In the Create window, click Site and scroll to and click Express Team Site. (See Figure 5-1.)

5. Enter a title and the URL where you want the site to appear.
6. Click Create. The new site is added beneath the existing top-level team site of your site collection, and you can begin to add your own content and customize it to meet your team's needs.


Create
Browse From:
Installed Items
Office.com
Filter By:
All Types
Library
List
Page
Site
All Categories
Blank & Custom
Collaboration
Communication
Content
Data
Meetings
Search
Select Language: English
Title ▲ Type
Charitable Contributions Web
Contacts Web Database
Decision Meeting Workspace
Document Center
Document Workspace
Express Team Site
Group Work Site
Issues Web Database
Multipage Meeting Workspace
Search Installed Items
Create
More Options
add new pages or lists to share ideas and information
Share this site with additional people
Post

Express Team Site

Type: Site
Categories: Collaboration

A site for teams to quickly create, organize and share information. It provides a document library and a list for managing announcements.

Marketing team

http://wideworld.sha.../<URL name>

marketing

FIGURE 5-1 Click Express Team Site to create a new team site quickly.

Putting Some Thought into the Team Site Design

If you're envisioning a team that will work together for a while, one that really needs to communicate well, have access to the latest versions of files, and be able to see at a glance what the various members of the team are working on, putting some thought into the design of the site will help you create a cloud experience your team members will be likely to appreciate and use. You might want to get together team members (on the phone or using Microsoft Lync) to discuss the following questions:

- What are your team goals?
- How long will your team be together?
- Will you focus on one project or multiple projects?
- Will you have regular team meetings?

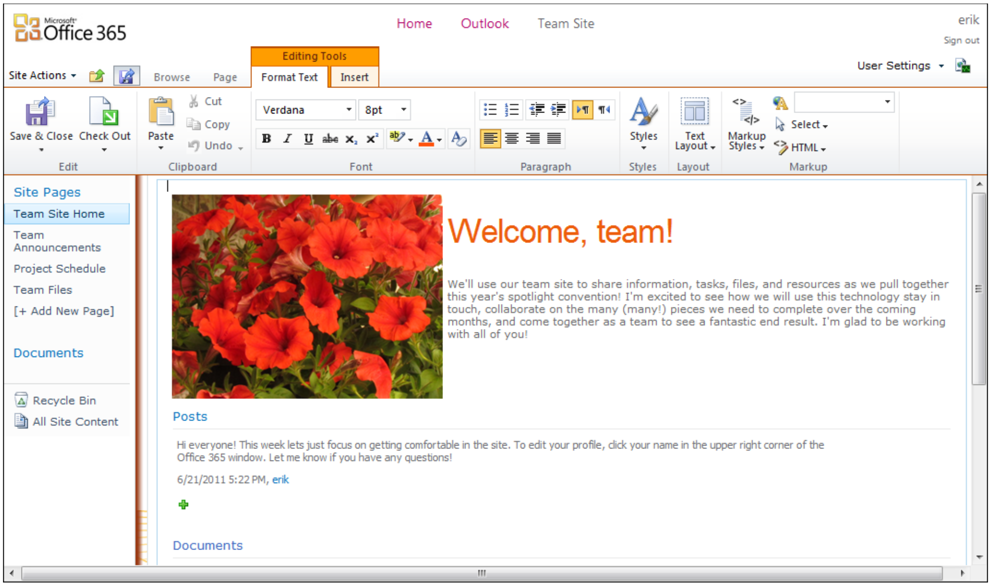
These types of function questions will help you determine what types of web parts and tools you'd like to add to your team site. If your team will be together over the long haul, creating multiple projects, you might want to envision a site with multiple pages that can each contain the files and updates related to one specific item you're working on.

Tip

Thinking through the overall look and function of your site also gives you the chance to throw a few design touches into the mix. You can easily choose—and change—site themes that coordinate the color scheme used throughout the site. You might want to choose a look that corresponds with your company logo, for example, or select a color and layout style that best reflects the type of content you'll be creating.

As you can see in Figure 5-2, SharePoint's Editing Tools Insert tab offers you the tools you need to add all sorts of elements to your team pages. You can insert the following elements by using the ready-made tools already placed on the ribbon for you:

- Tables
- Pictures
- Links
- Files
- Document libraries
- A calendar
- Announcements


Office 365
Home
Outlook
Team Site
erik
Sign out
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
User Settings
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup
Site Pages
Team Site Home
Team Announcements
Project Schedule
Team Files
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Posts
Documents

Welcome, team!

We'll use our team site to share information, tasks, files, and resources as we pull together this year's spotlight convention! I'm excited to see how we will use this technology stay in touch, collaborate on the many (many!) pieces we need to complete over the coming months, and come together as a team to see a fantastic end result. I'm glad to be working with all of you!

Hi everyone! This week lets just focus on getting comfortable in the site. To edit your profile, click your name in the upper right corner of the Office 365 window. Let me know if you have any questions!

6/21/2011 5:22 PM, erik

FIGURE 5-2 SharePoint's Editing Tools Insert tab offers a number of tools you can add to the pages in your team site.

Tip

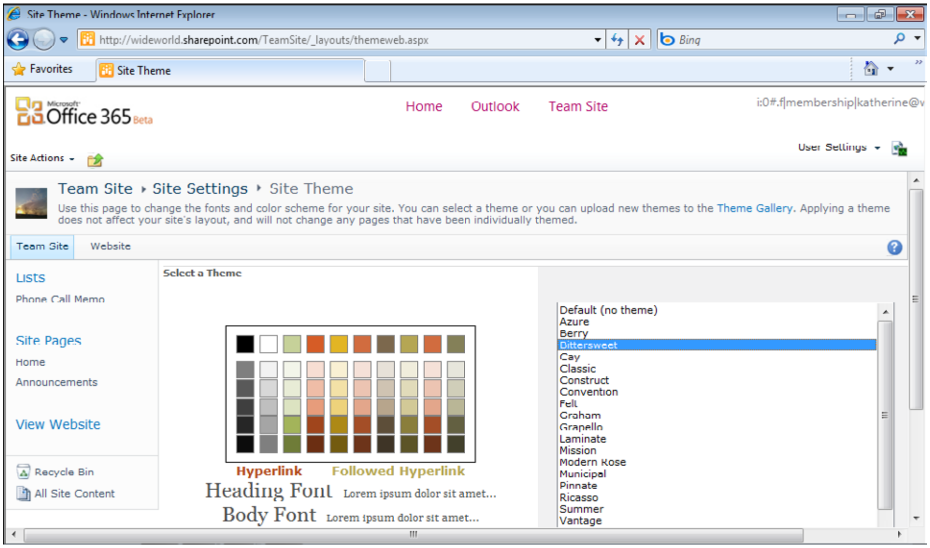
Choosing a Site Theme

One of the first choices you're likely to make as you develop your team site will have to do with how you want the site to look. SharePoint Online makes it easy for you to apply a coordinated color scheme—which carries through all tools you add to the site—that creates a kind of distinctive look and feel for your team space.

We know a lot more about color choices than we used to, especially when it comes to creating a work environment with the right feel. Cool colors—like light blue or green—create a kind of relaxing atmosphere; you might use these colors when you're working on a high-stress project and want to help everybody maintain their equilibrium and not stress out. For low-energy teams that need to be cranked up a notch, use vivid colors like reds and oranges to stimulate attention and get some of those creative juices flowing.

By default, the Office 365 color choice is set to Default (no theme), which gives you a very basic, clean-cut look for your team site. To change the default theme to one with a bit more color definition, follow these steps:

1. Display the site by logging in to Office 365 and clicking Team Site.
2. Click Site Actions.
3. Choose Site Settings.
4. In the Look And Feel area, click Site Theme.
5. In the panel on the right in the Select A Theme window (shown in Figure 5-3), click the names of different themes to see the color combination on the preview grid on the left side of the screen. The fonts selected for headings and body text also change to show your selection.
6. When you have selected the theme you like, click the Apply button at the bottom of the list.


Site Theme - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/themeweb.aspx
Bing
Favorites
Site Theme
Office 365 Beta
Home
Outlook
Team Site
i:0#.f|membership|katherine@v
User Settings
Site Actions
Team Site › Site Settings › Site Theme
Team Site
Website
Lists
Phone Call Memo
Site Pages
Home
Announcements
View Website
Recycle Bin
All Site Content
Select a Theme
Hyperlink
Followed Hyperlink
Heading Font
Lorem ipsum dolor sit amet...
Body Font
Lorem ipsum dolor sit amet...

Use this page to change the fonts and color scheme for your site. You can select a theme or you can upload new themes to the Theme Gallery. Applying a theme does not affect your site's layout, and will not change any pages that have been individually themed.

Default (no theme)
Azure
Berry
Bittersweet
Cay
Classic
Construct
Convention
Fell
Graham
Grapello
Laminate
Mission
Modern Rose
Municipal
Pinnate
Ricasso
Summer
Vantage

FIGURE 5-3 Choose from a variety of color palettes that control the color of hyperlinks, headings, and body text on your site.

Tip

Office 365 processes your changes and displays the team site with the new theme selection in place.

You can change your site theme as often as you like until you settle on a style you want to keep. You might want to choose a theme that corresponds to your company logo, your product packaging design, or some other set of colors that have some relevance to what you're trying to do. Or, as an exercise designed to help your team feel more involved in the process, you could ask the team to vote on the color selections they like best.

For best results, and a cohesive team, however, get your theme choices established early and keep the same look and feel for the duration of your project. Too much changing right off the bat can make your team feel scattered, like the workspace has no real definition. A solid choice at the beginning and consistency throughout the project helps establish stability and a sense of identity for the team.

Only those with Admin privileges will be able to make the theme changes, however, so you might have to choose different themes over a series of days and have team members vote for the themes they like best.

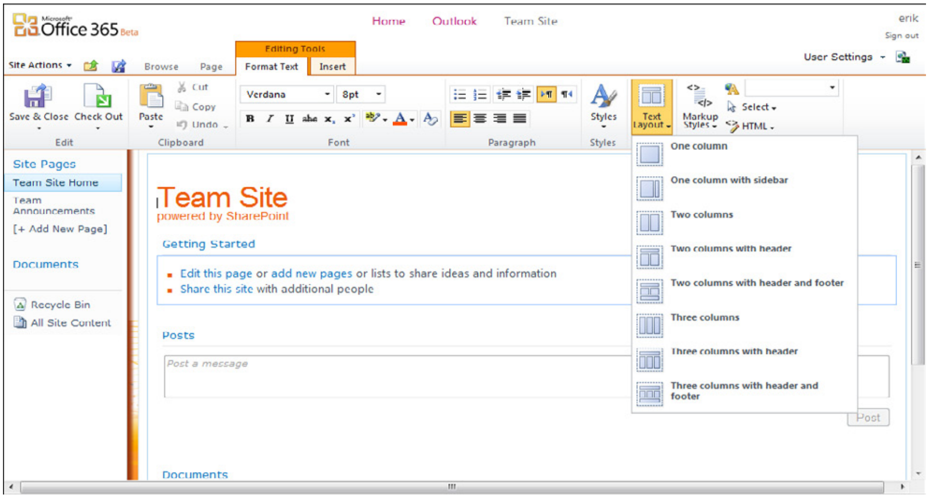
Changing the Text Layout of Your Page

The way your page is laid out is another important choice that contributes to the overall look of your team site. The layout also affects the way tools appear in the columns on the page, which of course affects how easily (or not) your team can find what they need. There's no single overarching text layout feature that affects all the pages you create; instead, you need to choose the layout for each page independently.

If you've been browsing the Web for any length of time, you have no doubt seen all kinds of layout styles, and some work better than others, depending on what publishers want to accomplish with their sites. Some are packed with information three or four columns wide; others are more open and might have a huge graphic front and center on the page, with a little text underneath. Many sites that are designed around sharing bits of information use some kind of columnar format to do that—you might have a navigation column on the left, a center column with primary articles, and an “extra” column on the right. That, of course, is just one example—notice as you browse other sites what you like and what you don’t. And bring that knowledge back to your SharePoint Online experience when you’re creating the user interface for your team.

To choose the layout you want to apply to the current page, follow these steps:

1. Select the team site page you want to edit, and click Edit to the left of the Browse tab.
2. In the Editing Tools Format Text tab, click Text Layout in the Layout group.
3. Click the option in the Text Layout list you want to apply. (See Figure 5-4.)


Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Markup Styles
Select
HTML
One column
One column with sidebar
Two columns
Two columns with header
Two columns with header and footer
Three columns
Three columns with header
Three columns with header and footer
Site Pages
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Team Site
powered by SharePoint
Getting Started
Posts
Post a message
Post
Documents

- Edit this page or add new pages or lists to share ideas and information
- Share this site with additional people

FIGURE 5-4 In Editing mode, click Text Layout in the Editing Tools Format Text tab to change the layout of the current page.

The layout is applied to the page, and your existing content is rearranged to fit the new layout. You can change the layout you’ve selected at any time by choosing Text Layout again and selecting a different option. You can also hide, remove, or modify individual text boxes that have content in them by clicking the arrow in the upper right corner of the text box and choosing Minimize, Delete, or Edit Web Part. (See Figure 5-5.)

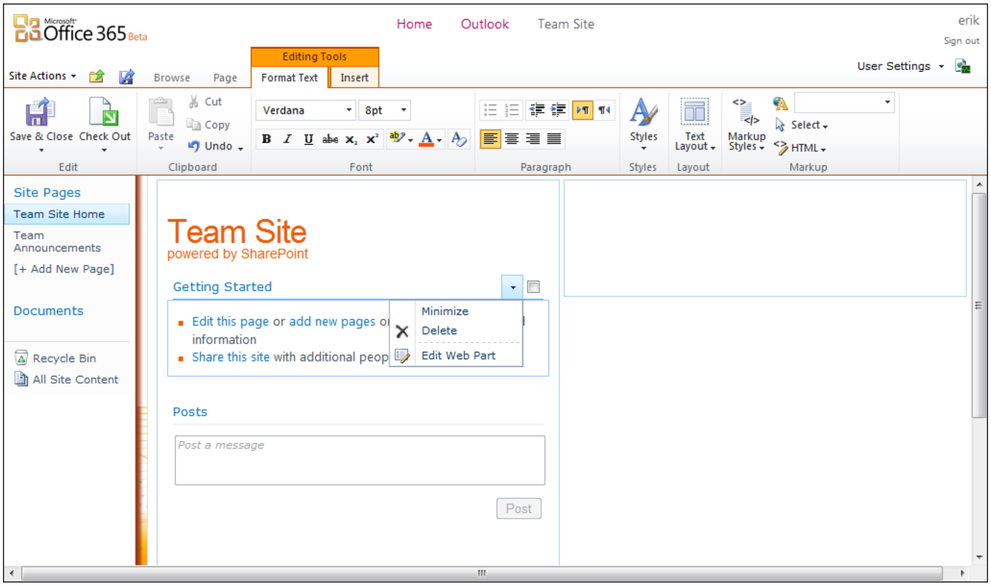

Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Select
HTML
Markup
Site Pages
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Team Site
powered by SharePoint
Getting Started
Edit this page or add new pages or
information
Share this site with additional peop
Minimize
Delete
Edit Web Part
Posts
Post a message
Post

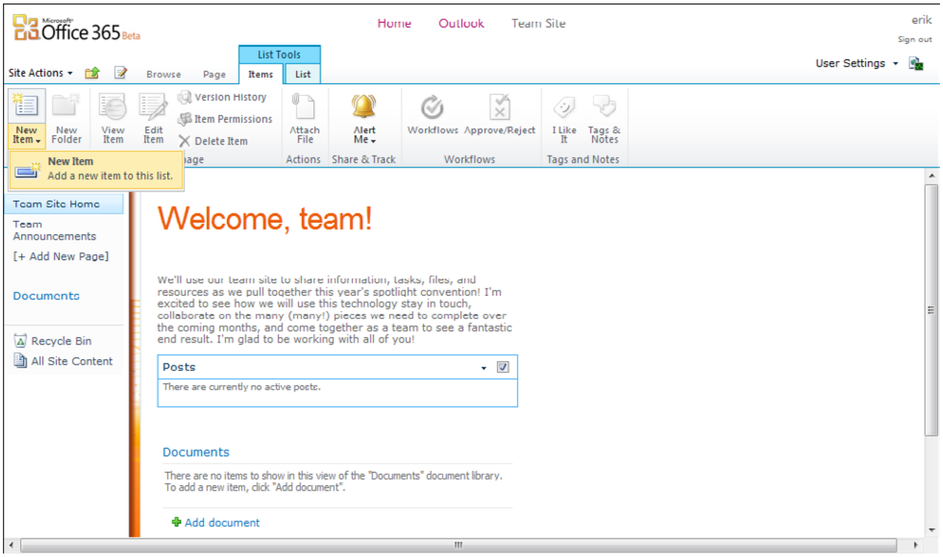
FIGURE 5-5 You can hide, remove, or change a text object by clicking the down arrow in the upper right corner of the text box.

You can go ahead and add introductory content to your page by clicking in the text box and adding a heading and opening paragraph. Use the Formatting tools in the Font group to apply the format you want to the text.

Posting an Update

One thing you might want to do—and something you can do at any time (whether you've chosen your theme and layout yet or not)—is post a note to let your team members know what's going on. By default, your team site Home page includes a Posts area, just beneath the Introduction area at the top of the screen.

To add a new note, click in the notes area and, in the List Tools List tab that appears, click New Item in the New group at the far left end of the ribbon. Click New Item, as shown in Figure 5-6.


Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
User Settings
Site Actions
Browse
Page
List Tools
Items
List
New Item
New Folder
View Item
Edit Item
Version History
Item Permissions
Delete Item
Attach File
Actions
Alert Me
Share & Track
Workflows
Approve/Reject
Workflows
I Like It
Tags & Notes
Tags and Notes
New Item
Add a new item to this list.
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Posts
Documents
Add document

Welcome, team!

We'll use our team site to share information, tasks, files, and resources as we pull together this year's spotlight convention! I'm excited to see how we will use this technology stay in touch, collaborate on the many (many!) pieces we need to complete over the coming months, and come together as a team to see a fantastic end result. I'm glad to be working with all of you!

There are currently no active posts.

There are no items to show in this view of the "Documents" document library. To add a new item, click "Add document".

FIGURE 5-6 Click the Posts area, and click New Item to add a post to the page.

In the Posts - New Item dialog box that appears (shown in Figure 5-7), type a title and the body content for your post. If you want the post to automatically expire, click the calendar symbol to the right of the Expires box and choose the date on which you want the note to expire. Click Save to add your post to the page. The information appears on the page below the post box so that your entire team can see it when they log in.

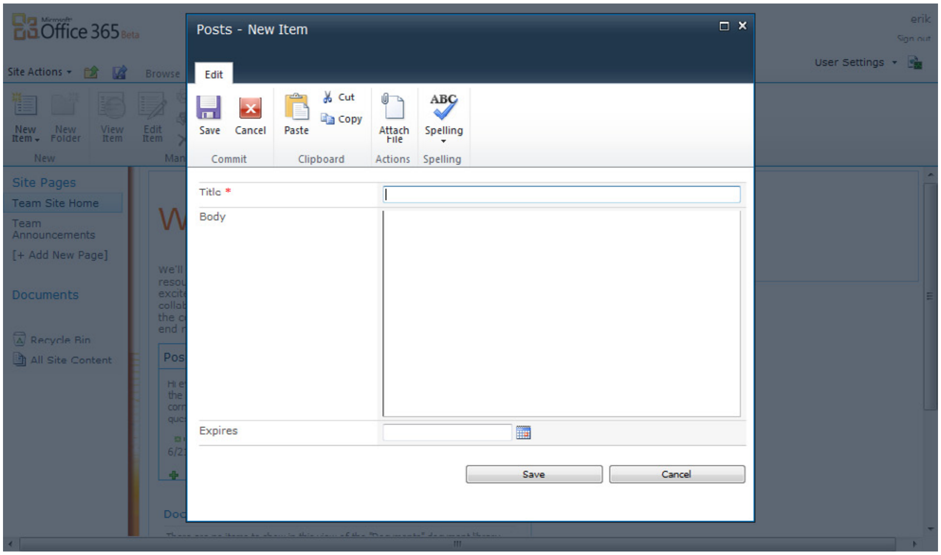

Microsoft Office 365 Beta
Posts - New Item
Edit
Save
Cancel
Commit
Paste
Cut
Copy
Clipboard
Attach File
Actions
Spelling
Spelling
Title *
Body
Expires
Save
Cancel
Site Actions
Browse
Site Pages
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
erik
User Settings

FIGURE 5-7 Enter a title and body for your note, and click Save.

Tip

If you want to edit the post you've just added, you can do so easily. Click the post, and the List Tools List tab appears on the ribbon. Click Edit Item in the Manage group. The Post appears in the View tab. Click Edit Item once again, make your changes, and click Save.

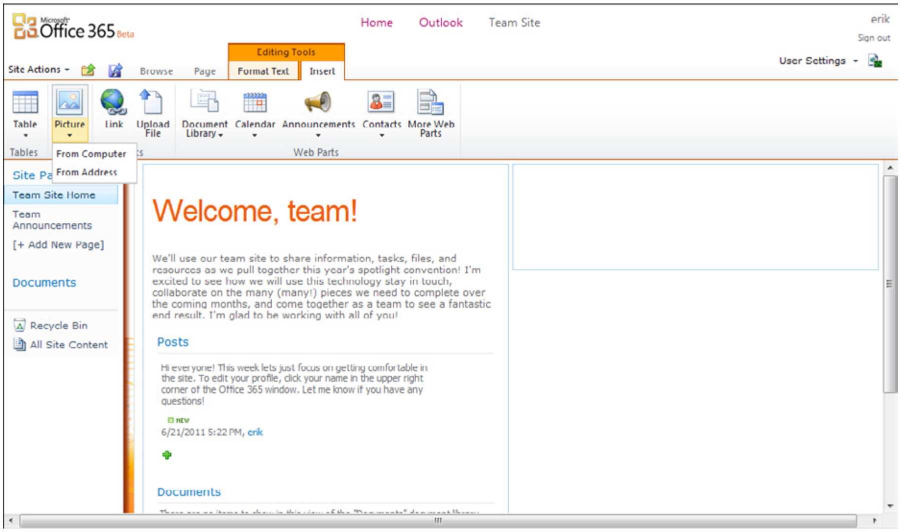
Adding and Formatting Pictures

And, of course, even if you're working on a ho-hum project with lots of ho-hum data and not-very-exciting personalities, you can always spruce up your space by sharing images—of products, people, buildings, flowers, or other fun or interesting images related to your team or project. Adding pictures to a page gives the page energy and life, even if the pictures aren't the most exciting in the world. Statistics show that people read and retain information better when they have images on the page to help rest their eyes (and reinforce the content). So think through ways to include some visuals on your page—even if they are just product pictures or the company logo.

So whether you have a functional reason to include photos—such as showing the latest product images you'll use in your catalog, or adding corporate head shots so that people can see each other in the site—or you simply want to decorate a little bit, the actual process for adding pictures is simple:

1. Display the page of the team site you want to change, and click to position the cursor where you want to add the picture.
2. Click Edit to the left of the Browse tab.
3. Click the region on the displayed page where you want to insert the picture.
4. Click the Editing Tools Insert tab.

5. Click Picture. (See Figure 5-8.)


Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Table
Picture
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Web Parts
From Computer
From Address
Site Pa
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Posts
NEW
Documents

Welcome, team!

We'll use our team site to share information, tasks, files, and resources as we pull together this year's spotlight convention! I'm excited to see how we will use this technology stay in touch, collaborate on the many (many!) pieces we need to complete over the coming months, and come together as a team to see a fantastic end result. I'm glad to be working with all of you!

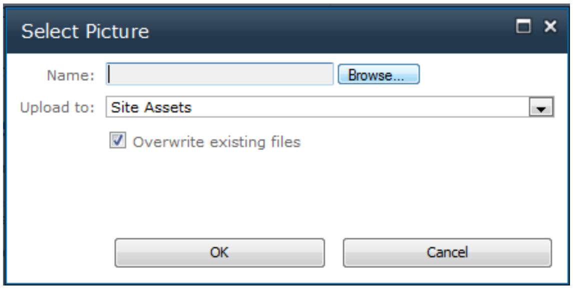
Hi everyone! This week lets just focus on getting comfortable in the site. To edit your profile, click your name in the upper right corner of the Office 365 window. Let me know if you have any questions!

6/21/2011 5:22 PM, erik

FIGURE 5-8 Click the Editing Tools Insert tab, and choose Picture to begin the process of adding art to the site.

6. Choose From Computer if you want to place an image that you have saved on your hard drive. Choose From Address if you want to use a picture from another website.

7. In the Select Picture dialog box (shown in Figure 5-9), click Browse and navigate to the folder containing the file you want to use. Click the file, and click Open.


Select Picture
Browse...
OK
Cancel

Name:

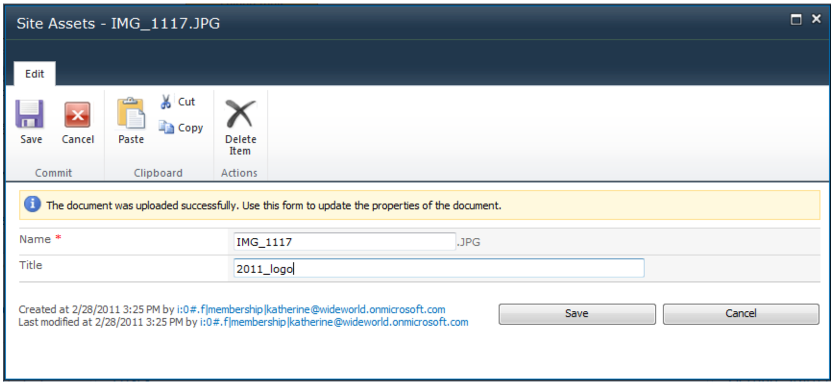
Upload to: Site Assets

☑ Overwrite existing files

FIGURE 5-9 Click Browse, and navigate to the folder on your computer where the picture you want to use is stored.

8. Choose the folder you want the picture to be uploaded into, and click OK.

9. In the Site Assets dialog box, type a title for the image (which also serves as alternate text for readers who can't see the visual), and click Save. (See Figure 5-10.)



The document was uploaded successfully. Use this form to update the properties of the document.

Name *	IMG_1117 .JPG
Title	2011_logo

Created at 2/28/2011 3:25 PM by i:0#.f|membership|katherine@wideworld.onmicrosoft.com
Last modified at 2/28/2011 3:25 PM by i:0#.f|membership|katherine@wideworld.onmicrosoft.com

FIGURE 5-10 Enter a title for the picture in the Site Assets dialog box.

The picture is added to your page, and the editing tools appear so that you can fine-tune the way the image looks on your page.

The Site Assets folder is probably fine for storing your pictures unless you want to create a specific folder related to your current project. If you have already created another folder and want to save the uploaded image to that folder, click the Upload To arrow and choose the folder you want. Then click OK.

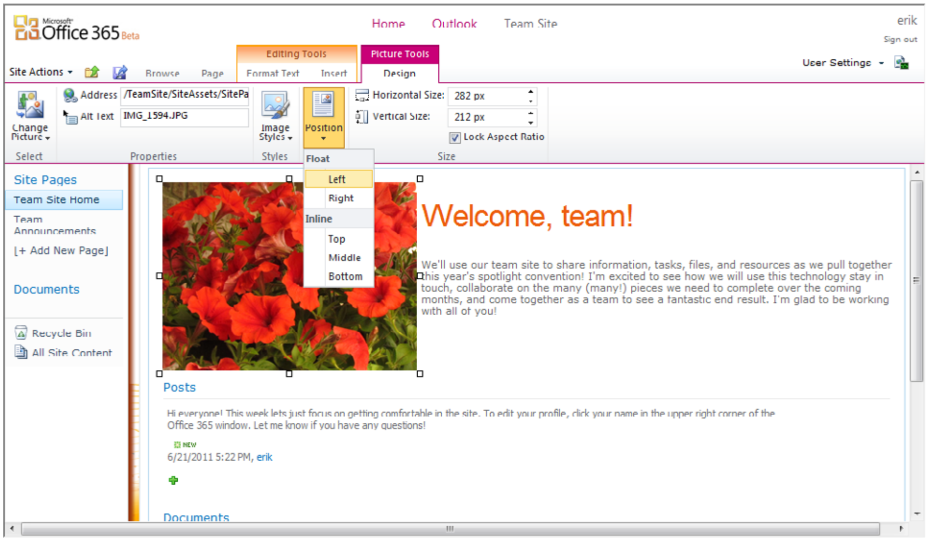
Editing Your Picture

If you've done any website work in the past, you probably remember how much of a pain it was to get images in the site that look just the way you want them to. And if you really wanted to change a few picture basics—like maybe add a border, change the size of the image, or realign it on the region of the page where you placed the picture—you needed to remember the commands so that you could manipulate the picture by hand.

Well, not any more. With Office 365, once you place the picture on the page, the Picture Tools Design tab displays the tools you need to make those sorts of changes easily. With just a few clicks and keystrokes, you're done. Here are the simple steps:

1. Click the image you just added to the page. The Picture Tools Design tab appears. (See Figure 5-11.)

2. To change the way the image aligns with the text on the page, click Position and choose the option you want from the displayed list.
3. To add or remove a border, click Image Styles and click your choice.
4. To resize a picture, click in the Horizontal Size or Vertical Size box and type the new measurement for the image (in pixels). If you want to preserve the aspect ratio of the picture, leave the Lock Aspect Ratio check box selected.
5. When you're finished making changes, simply click outside the picture and the tools disappear.


Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Picture Tools
Design
Change Picture
Select
Properties
Image Styles
Styles
Position
Float
Left
Right
Inline
Top
Middle
Bottom
Size
Site Pages
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Posts
NEW
Documents

Address: /TeamSite/SiteAssets/SitePa

Alt Text: IMG_1594.JPG

Horizontal Size: 282 px

Vertical Size: 212 px

☑ Lock Aspect Ratio

Welcome, team!

We'll use our team site to share information, tasks, files, and resources as we pull together this year's spotlight convention! I'm excited to see how we will use this technology stay in touch, collaborate on the many (many!) pieces we need to complete over the coming months, and come together as a team to see a fantastic end result. I'm glad to be working with all of you!

Hi everyone! This week lets just focus on getting comfortable in the site. To edit your profile, click your name in the upper right corner of the Office 365 window. Let me know if you have any questions!

6/21/2011 5:22 PM, erik

FIGURE 5-11 Use the tools on the Picture Tools Design tab to enter the alternate text, change the position, or resize the image.

Tip

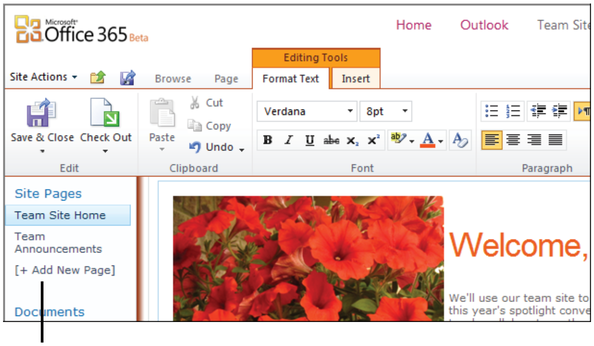
Adding a New Page

When you first begin working with your team site, of course, SharePoint Online has started the process for you by giving you both a team site and a public-facing website that you can use to share information with your clients and prospective customers. But part of thinking through the overall plan for your team site means envisioning what other pages you want to include. Depending on the type of team you're creating—and the type of work you all need to do together—your site will need different types of pages.

So what kind of pages will you want to add? In a later section, you'll learn about web parts, but you might want to create different page for different functions. For example, one page might contain your marketing strategy, a document library of marketing files you use, some marketing images, and a post area where those on your team who are focusing on marketing can update the others about their project tasks. Another page might be a general team page, in which you use social media type updates, announcements, and more to help the team stay in sync. Another page might have a log of deliverables—which pieces need to be reviewed when.

To add a page to your team site, follow these steps:

1. Click the [+ Add New Page] link in the navigation bar on the left side of the screen. (See Figure 5-12.)
2. In the New Page dialog box, type a name for the new page and click Create.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
8pt
Font
Paragraph
Site Pages
Team Site Home
Team Announcements
[+ Add New Page]
Documents
Welcome,
We'll use our team site to
this year's spotlight conve

Click to add a new page.

FIGURE 5-12 Click [+ Add New Page] in the navigation panel on the left to add a new page to your team site.

Office 365 then creates the page with the new name you entered and displays the blank page, ready for you to add your content.

Entering and Editing Content

Adding content to your page really is as easy as clicking and typing. You can, of course, format the text to your heart's content—similar to the techniques you use every day in Microsoft Word—and you can copy and paste information into Office 365 as you would any other application.

When you first add a new page, Office 365 displays the blank page and positions the cursor in the top area of the screen, ready for you to type your first bit of text. You can simply click the tool you want in the Editing Tools Format Text tab to change the format of your text.

When you open an existing page, you need to click the Edit tool, to the left of the Browse tab, to display the page in editing mode. The Editing Tools tab appears so that you can make the changes you want to make to the page. You might want to

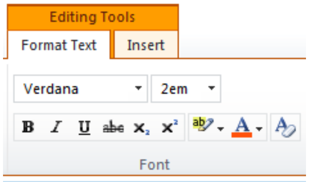
- Change the font size, style, or color.
- Format the text and set paragraph alignment.
- Choose specific text styles for the content.
- Apply markup styles to the text you add.
- Identify the language you used for the content you've added.

The following sections touch on some of these editing tasks. Many of you already know how to do these tasks from your work with other word processing programs.

Formatting Your Text

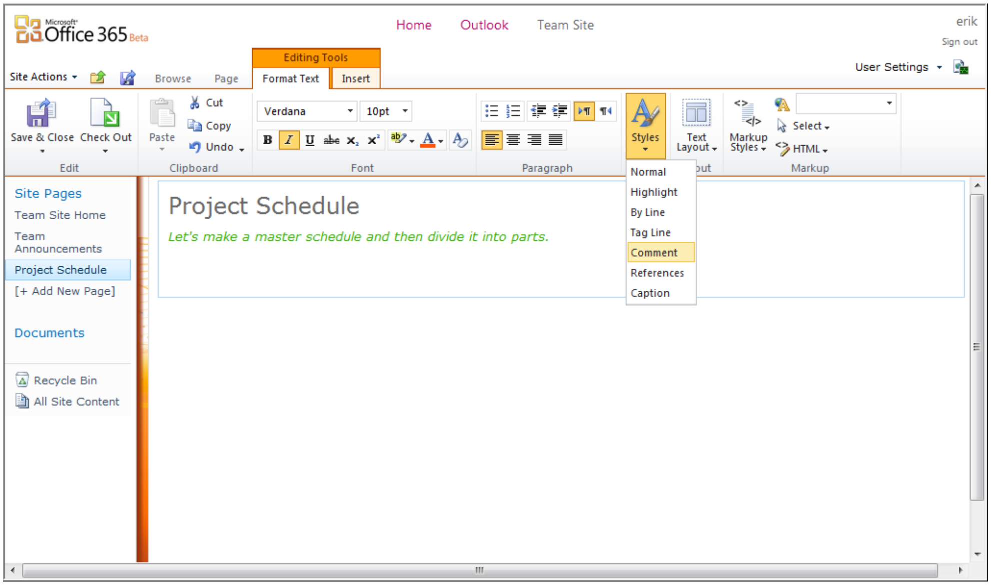
The basic steps involved in typing and formatting the text, headings, captions, and other content on your page is super simple. When you click in a text box on a page in your team site, the Editing Tools tab appears, showing the Format Text tab by default.

To format text you've already typed, simply select the text and then choose a new setting in the Font group in the Format Text tab. You can change the font, size, and style (bold, italic, underline, strikethrough, subscript, and superscript), apply highlighting of various colors, change the color of the text, or clear all formatting current applied to the text.


Editing Tools
Format Text
Insert
Verdana
2em
Font

Adding Text Styles

SharePoint Online includes a number of text styles you can apply to the text on your pages. Click Styles in the Layout group to display a menu of style options. You'll find the styles shown in Figure 5-13. To apply one of the styles to existing text, simply highlight the text and choose the style. You can also apply a style before you begin typing by clicking to position the cursor and then choosing the style.


Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
10pt
Font
Paragraph
Styles
Text Layout
Markup Styles
Select
HTML
Markup
Normal
Highlight
By Line
Tag Line
Comment
References
Caption
Site Pages
Team Site Home
Team Announcements
Project Schedule
[+ Add New Page]
Documents
Recycle Bin
All Site Content

Project Schedule

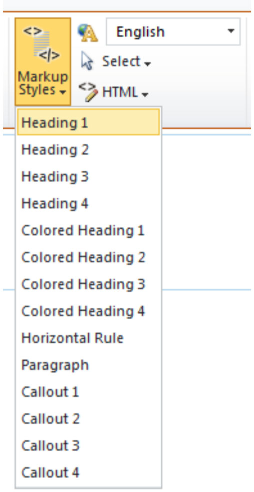
Let's make a master schedule and then divide it into parts.

FIGURE 5-13 You can apply a text style to your text before or after you type.

Applying Markup Styles

Because you're working on the web with Office 365, having a tool that enables you to apply markup styles directly to your text is a good thing. This helps you style your team site pages the way you would prepare your website pages using HTML markup styles.

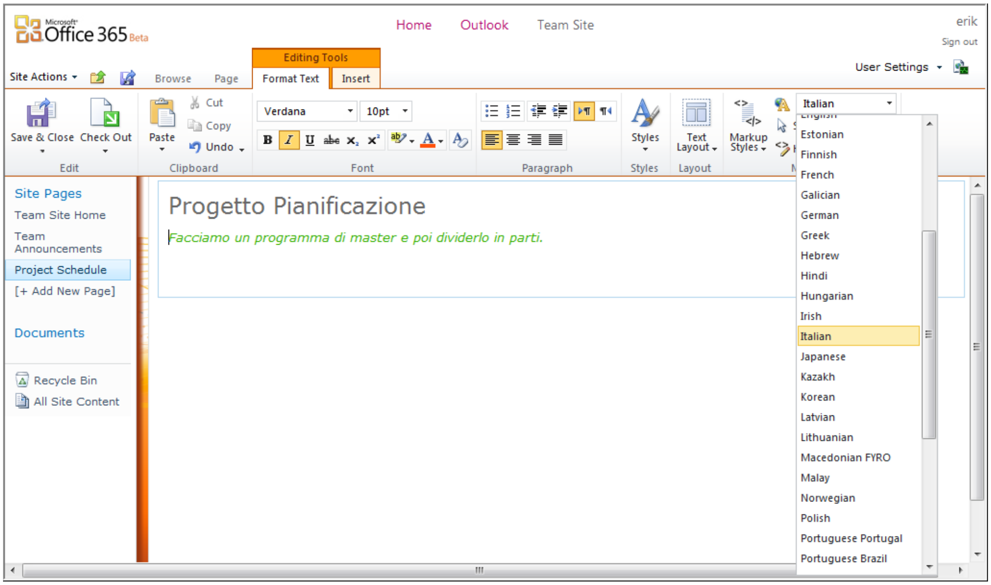
If you've done any work with markup languages in the past, you might recognize the styles shown here:


Markup Styles
English
Select
HTML
Heading 1
Heading 2
Heading 3
Heading 4
Colored Heading 1
Colored Heading 2
Colored Heading 3
Colored Heading 4
Horizontal Rule
Paragraph
Callout 1
Callout 2
Callout 3
Callout 4

Again, you can apply the markup styles to the text *after* you add it or before you type it. Either way, the styles will be embedded in the HTML for the site and will be recognized and displayed properly no matter which browsers your teammates might be using.

Coding for Language

On the far right side of the Markup group of the Editing Tools Format Text tab, you'll find the Languages tool. You can use this tool to add a markup tag to your content that tells the browser which language is being used. For example, if you have a word or phrase in Italian for your teammates in Italy (shown in Figure 5-14), you can select that phrase, click the Languages arrow, and choose Italian from the list. This tells the browser the language being used so that it is represented properly in team members' browsers if the web browser supports this.


Microsoft Office 365 Beta
Home
Outlook
Team Site
erik
Sign out
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Save & Close
Check Out
Edit
Paste
Cut
Copy
Undo
Clipboard
Verdana
10pt
Font
Paragraph
Styles
Styles
Text Layout
Layout
Markup Styles
Italian
English
Estonian
Finnish
French
Galician
German
Greek
Hebrew
Hindi
Hungarian
Irish
Italian
Japanese
Kazakh
Korean
Latvian
Lithuanian
Macedonian FYRO
Malay
Norwegian
Polish
Portuguese Portugal
Portuguese Brazil
Site Pages
Team Site Home
Team Announcements
Project Schedule
[+ Add New Page]
Documents
Recycle Bin
All Site Content

Progetto Pianificazione

Facciamo un programma di master e poi dividerlo in parti.

FIGURE 5-14 Apply language markup when you have words or phrases in other languages on your page.

Tip

Adding Web Parts

Web parts are exciting interactive tools you can use on your team site to add all sorts of functionality to the pages. The Editing Tools Insert tab contains the Web Parts group with ready-made Web parts you can insert directly on your page. These web parts can do the following:

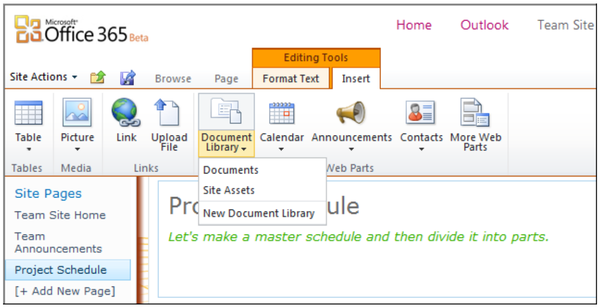
- Add a document library to your page.
- Insert a new or existing calendar on the team page.
- Create or add an announcements list.
- Add a list of contacts to the page.

The More Web Parts tool includes a number of specialized elements you can use to expand the functionality of your site. Depending on what you want to do with your site, you can add Web parts that do the following things:

- Deliver content that is relevant to individual users.
- Add a site assets list.
- Show the whereabouts of your team members.
- Post upcoming events.
- Add a phone call memo tool.
- Add an image viewer or a slideshow web part.
- Insert a web part that delivers Microsoft Silverlight content.
- Add a user task list.
- Create a list of team members in the site.

To add a web part to a page in your team site, begin by displaying the page on which you want to add the part. Then follow these steps:

1. Click in the region of the team page where you want to add the web part.
2. Click the Editing Tools Insert tab.
3. Click the web part—for example, Document Library—you want to add to your page. (See Figure 5-15.)
4. If you have more than one document library already created, a list appears so that you can choose the one you want to add. You can also choose New Document Library if you want to create a new one.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
Table
Picture
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Web Parts
Documents
Site Assets
New Document Library
Site Pages
Team Site Home
Team Announcements
Project Schedule
[+ Add New Page]
Pr
ule

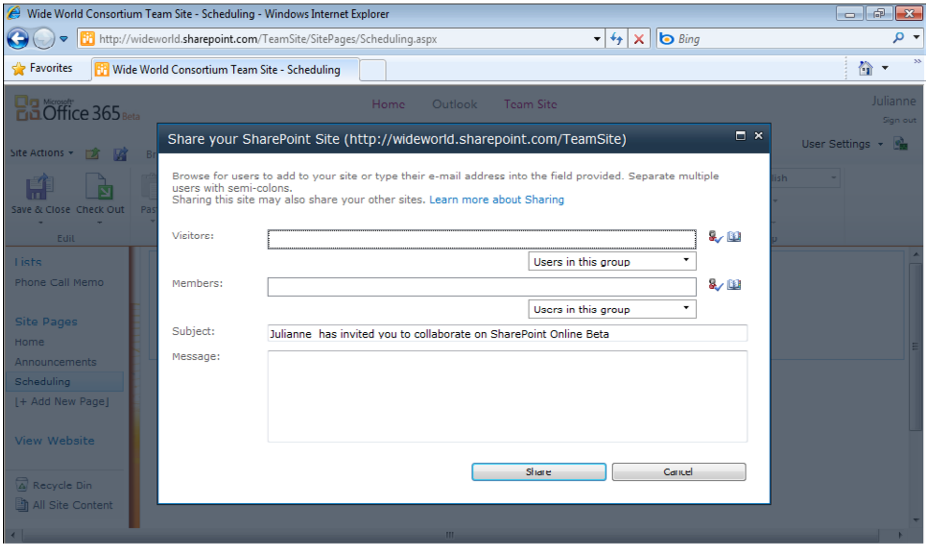
Let's make a master schedule and then divide it into parts.

FIGURE 5-15 You can easily add web parts to your team page using the Web Parts tools in the Editing Tools Insert tab.

Sharing Your Site

Even though your SharePoint Online team site is meant to be a secure environment for you and your team to work in, you can invite other team members to join you once you get the site going. To share a team site with someone else, follow these steps:

1. Select your team site from your Office 365 home page.
2. Click Site Actions on the far left side of the ribbon.
3. Choose Share Site.
4. In the Share Your SharePoint Site window (shown in Figure 5-16), enter the email addresses of the team members you want to add to the site. You can click Check Names, to the right of the text fields, to ensure that you are choosing participants in your company address book.
5. Alternately, you can click the Users In This Group arrow and select the group you want to use to find the visitors or members you want to invite.
6. Modify the Subject line if you like, and type a message in the bottom text field.
7. Click Share to send the invitation to your contacts.


Wide World Consortium Team Site - Scheduling - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Scheduling.aspx
Bing
Favorites
Wide World Consortium Team Site - Scheduling
Office 365 Beta
Home
Outlook
Team Site
Julianne
Sign out
User Settings
Site Actions
Save & Close
Check Out
Edit
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Share
Cancel

Share your SharePoint Site (http://wideworld.sharepoint.com/TeamSite)

Browse for users to add to your site or type their e-mail address into the field provided. Separate multiple users with semi-colons.
Sharing this site may also share your other sites. Learn more about Sharing

Visitors:
Users in this group
Members:
Users in this group
Subject: Julianne has invited you to collaborate on SharePoint Online Beta
Message:

FIGURE 5-16 You can invite others to join you in the team site by choosing Share Site from the Site Actions list.

When the people you invited receive the e-mail invitation, they will be able to click the link in the message and log in to the site.

What's Next

This chapter gave you a close look at a number of the tasks you'll want to accomplish soon after creating your team site. Whether you want to keep it simple or create an elaborate design, you can enhance the form and function of the site by choosing a theme, customizing the format, adding pages and content, inserting and editing pictures, adding web parts, and more. In the next chapter, you learn how to add files to your SharePoint team site, share them with others, and check them in and out for your use.

CHAPTER 6

Posting, Sharing, and Managing Files

IN THIS CHAPTER:

- What is a document library (and where is it)?
- Creating a document library
- Organizing document libraries
- Working with document library files
- What's next

HAVING AN ONLINE PLACE to gather is important, especially if you hope your team will gel into a productive group with members who enjoy each other's company and work well together. But you can create groups in all kinds of places—blogs, social media sites, and even in your favorite instant messaging tools. Why do you need a tool as sophisticated as SharePoint Online to give your group that extra something it needs to succeed?

The file management capabilities of SharePoint Online enable you to create document libraries, share documents and pictures, check files in and out, and work with files in a way that will help your team be as productive as possible. This chapter shows you how to set up, manage, and work with team files in SharePoint Online.

What Is a Document Library (and Where Is It)?

When you first begin using your SharePoint team site, you'll find a basic page already created for you—but that's it. If you want to add a document library—a place to store, organize, and manage the files you'll share with your team—you'll need to add it yourself. This section shows you how to think through, create, and add files to document libraries in your site.

PLANNING YOUR LIBRARIES

What kinds of files will your team share? This depends on the types of projects you're creating. If you're preparing a marketing report, for example, you'll probably work with files like these:

- A set of notes about the project
- Minutes from meetings about the project's design
- The schedule for delivery
- Images of products that will be included
- A document with the text for the report
- A worksheet showing the budget for the project
- Reviewers' comments or review forms

And this might just be the tip of the iceberg. Your project might be much more complicated, or you could have several projects going on at once—in which case, you might want to create different document libraries on different pages to contain the files related to the various projects.

One of the beautiful things about document libraries is that they enable you to cut down on the number of versions you have available for an individual file. Suppose that you write a draft of the text for the report and then post it to the site. Another team member can edit it; someone else can do a content review; the designer can apply the template and theme you want to use; a manager can do a line-by-line review—*all using the same file*. This means you won't have six different versions of the file that someone will need to merge into the most recent copy. Using the file check-in and check-out feature in SharePoint, team members can each make their changes to the file in the file library so that all changes are incorporated in one file and you don't run the risk of using the wrong file when it's time to finalize the project.

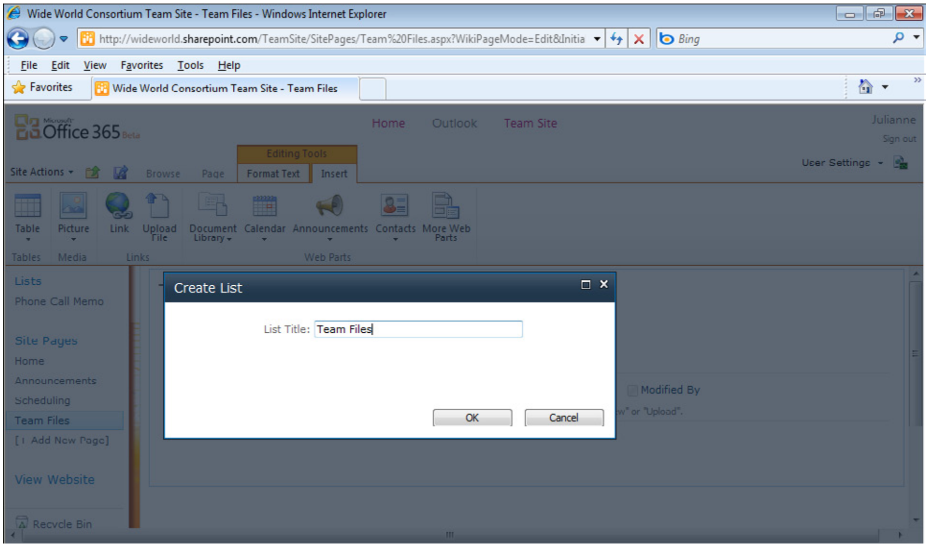
Creating a Document Library

In the previous chapter, you walked through the process of adding a document library when you added a web part in SharePoint Online. You can create a document library on any page you'd like, anywhere in your site. The trick is to begin on the page where you want to add the library. Then follow these steps:

1. Click the link in the navigation panel on the left that will display the page you want to use.

Tip

2. Click Edit to the left of the Browse tab.
3. Click the Editing Tools Insert tab.
4. Click Document Library in the Web Parts group, and choose New Document Library.
5. In the Create List dialog box, type a name for the document library and click OK. (See Figure 6-1.)


Wide World Consortium Team Site - Team Files - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Team%20Files.aspx?WikiPageMode=Edit&Initia
Bing
File
Edit
View
Favorites
Tools
Help
Favorites
Wide World Consortium Team Site - Team Files
Office 365 Beta
Home
Outlook
Team Site
Julianne
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Table
Picture
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Web Parts
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
Modified By
Create List
OK
Cancel

List Title: Team Files

FIGURE 6-1 Create a new document library, and name it in the Create List dialog box.

You can name the document library just about anything you want and include spaces, punctuation characters, and even items that are no-nos in other names, such as percentage symbols and exclamation points. The name of the document library will also appear in the Document Library list in the Web Parts group so that you always have the option of adding the library to another page if you like.

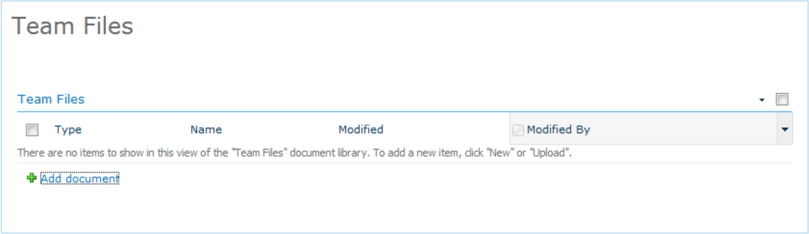
Adding Documents

Now to make the library functional, you need to add some files. You can do this by uploading files one at a time, or you can upload multiple files at once. When you're first creating the document library, you might want to add all the files you've saved using the multiple upload feature, and then as you expand the files later, add them one at a time. This section describes both processes.

Posting Single Documents

Here are the steps for uploading a single document:

1. Begin by clicking the Add Document link beneath the document library. (See Figure 6-2.)

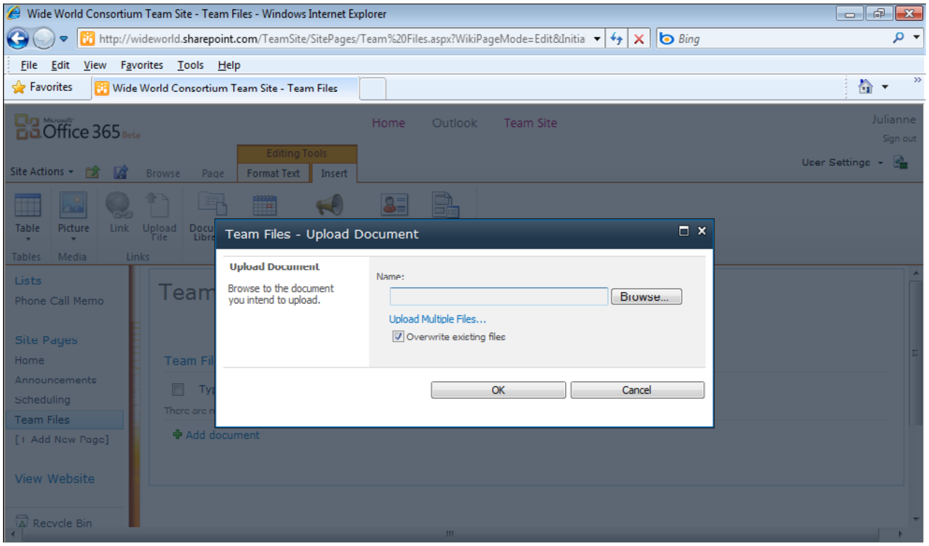
   

   There are no items to show in this view of the "Team Files" document library. To add a new item, click "New" or "Upload".

   FIGURE 6-2 Click Add Document to begin adding documents to your library.

2. In the Team Files – Upload Document dialog box (shown in Figure 6-3), click the Browse button.
3. Navigate to the folder containing the file you'd like to add. Click it and click Open.
4. Click OK to close the Upload Document dialog box.

   The file is added to the list, and the type, name, date the file was last modified, and name of the person who modified the file are displayed in the document library.


Wide World Consortium Team Site - Team Files - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Team%20Files.aspx?WikiPageMode=Edit&Initia
Bing
File
Edit
View
Favorites
Tools
Help
Favorites
Wide World Consortium Team Site - Team Files
Office 365 Beta
Home
Outlook
Team Site
Julianne
Sign out
Editing Tools
Site Actions
Browse
Page
Format Text
Insert
User Settings
Table
Picture
Link
Upload File
Tables
Media
Links
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
Team
Add document
Team Files - Upload Document
Upload Document
Name:
Browse...
Upload Multiple Files...
OK
Cancel

Browse to the document you intend to upload.

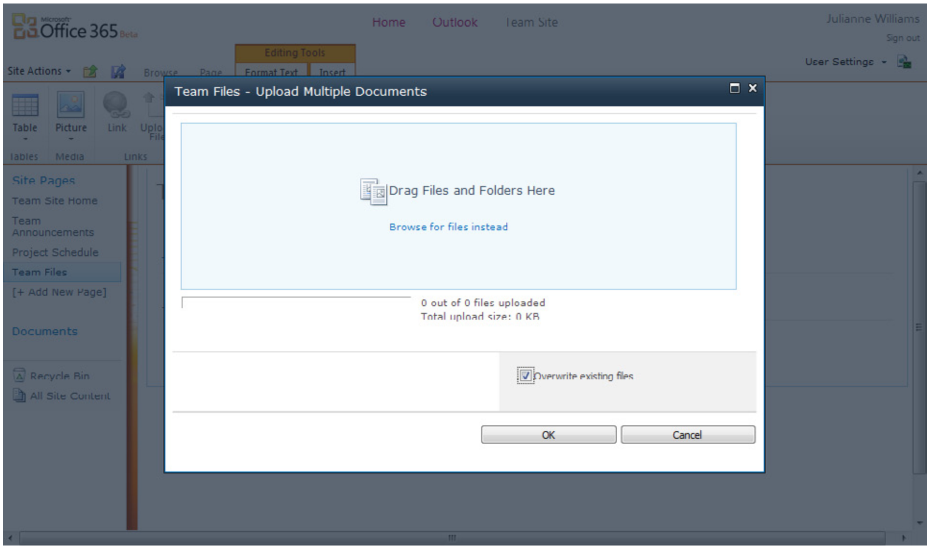
☑ Overwrite existing files

FIGURE 6-3 You click Browse in this dialog box to upload a single file.

Adding Multiple Documents

If you have a number of files you want to post to your document library, you'll find it easier to upload them all at once. Here is how to do that:

1. Begin by clicking the Add Document link.
2. In the Team Files – Upload Document dialog box, click Upload Multiple Files. The Team Files – Upload Multiple Documents dialog box appears. (See Figure 6-4.)
3. Using the folder tree on the left, you can drag the files you want to upload to the blue area in the top of the dialog box or click the Browse For Files Instead link to display the Open dialog box.
4. If you choose to browse for files, navigate to the folder containing the files you want to add and select them.
5. Click Open to add the files.


Office 365 Beta
Home
Outlook
Team Site
Julianne Williams
Sign out
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
User Settings
Table
Picture
Link
Upload File
Tables
Media
Links
Site Pages
Team Site Home
Team Announcements
Project Schedule
Team Files
[+ Add New Page]
Documents
Recycle Bin
All Site Content
OK
Cancel

Team Files - Upload Multiple Documents

Drag Files and Folders Here

Browse for files instead

0 out of 0 files uploaded
Total upload size: 0 KB

☑ Overwrite existing files

FIGURE 6-4 The dialog box that appears when you click Upload Multiple Files in the Team Files – Upload Document dialog box.

Tip

Organizing Document Libraries

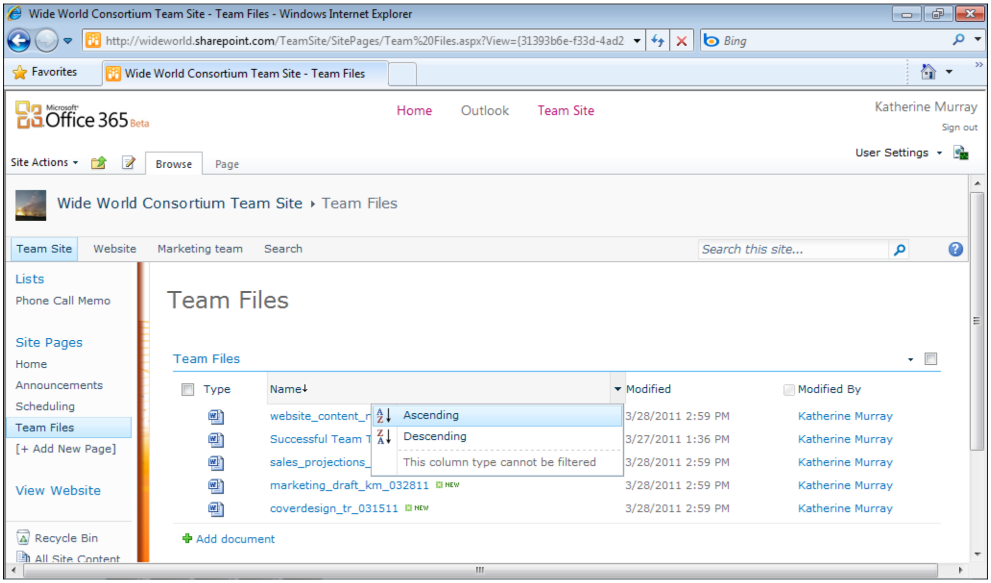
Keeping your documents named and organized effectively will go a long way toward helping your team find what they need when they need it. You can help this process along by choosing specific naming conventions for the various files you post. You might ask everyone to name files with their initials and the date in the file name, or assign specific codes for different departments to use so that they'll be able to recognize their own files easily.

In addition to ordering files by the naming conventions you choose, you can also arrange files based on the information in the document library table. What's more, you can customize the columns in the document library to include information that you feel is most relevant to your project.

Ordering Files in Your Document Library

By default, the document library shows four columns: Type, Name, Modified, and Modified By. You can sort the files by hovering the mouse cursor over the column you want to sort by; when the down arrow appears, click the arrow to display a list of sorting options.

For example, if you want to sort the Name column so that the files appear alphabetically from A to Z, hover the cursor over the left side of the Name column header. Click Ascending (as shown in Figure 6-5), and the files are alphabetized in the document library.


Wide World Consortium Team Site - Team Files - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Team%20Files.aspx?View={31393b6e-f33d-4ad2
Bing
Favorites
Wide World Consortium Team Site - Team Files
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
Site Actions
Browse
Page
User Settings
Wide World Consortium Team Site ▸ Team Files
Team Site
Website
Marketing team
Search
Search this site...
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Team Files
Team Files
Ascending
Descending
This column type cannot be filtered
Add document

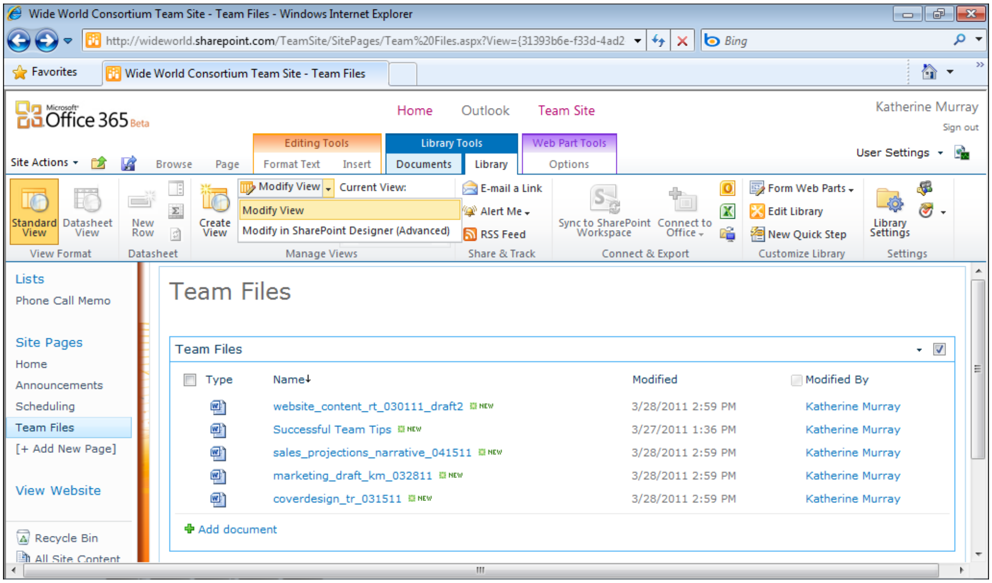
Type	Name↓	Modified	Modified By
	website_content_r	3/28/2011 2:59 PM	Katherine Murray
	Successful Team T	3/27/2011 1:36 PM	Katherine Murray
	sales_projections_	3/28/2011 2:59 PM	Katherine Murray
	marketing_draft_km_032811 NEW	3/28/2011 2:59 PM	Katherine Murray
	coverdesign_tr_031511 NEW	3/28/2011 2:59 PM	Katherine Murray

FIGURE 6-5 You can sort the files in the document library so that they are easy for your team members to find.

Modifying the Current View

You can easily create your own kind of document library with the columns that best fit the information you need to know for your specific project. For example, you might want to add a column that shows who a file is checked out to and list the departments that are responsible for the various files.

Begin the process of modifying the current view of the document library by clicking the top row of the document library table. The Library Tools Library tab becomes available. Click Modify View and a list of options—which include Modify View and Modify In SharePoint Designer (Advanced)—appears. Click Modify View. (See Figure 6-6.)


Wide World Consortium Team Site - Team Files - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Team%20Files.aspx?View={31393b6e-f33d-4ad2
Bing
Favorites
Wide World Consortium Team Site - Team Files
Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Library Tools
Documents
Library
Web Part Tools
Options
Standard View
Datasheet View
View Format
New Row
Datasheet
Create View
Modify View
Current View:
Modify View
Modify in SharePoint Designer (Advanced)
Manage Views
E-mail a Link
Alert Me
RSS Feed
Share & Track
Sync to SharePoint Workspace
Connect to Office
Connect & Export
Form Web Parts
Edit Library
New Quick Step
Customize Library
Library Settings
Settings
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Team Files
Team Files
Add document

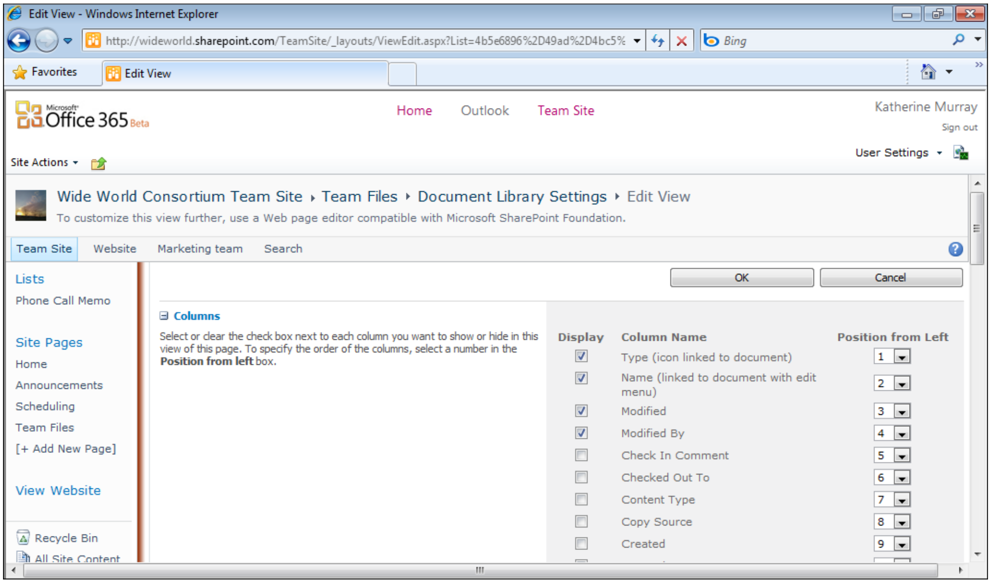
Type	Name	Modified	Modified By
	website_content_rt_030111_draft2 NEW	3/28/2011 2:59 PM	Katherine Murray
	Successful Team Tips NEW	3/27/2011 1:36 PM	Katherine Murray
	sales_projections_narrative_041511 NEW	3/28/2011 2:59 PM	Katherine Murray
	marketing_draft_km_032811 NEW	3/28/2011 2:59 PM	Katherine Murray
	coverdesign_tr_031511 NEW	3/28/2011 2:59 PM	Katherine Murray

FIGURE 6-6 Click the document library, and choose Modify View in the Library Tools Library tab to modify the library.

You can change many things about the way your files appear in your document library. Clicking Modify View displays a screen that offers you a number of settings you can tailor to change the way the library appears. As you see in Figure 6-7, the choices on this screen enable you to do the following:

- Choose the columns you want to appear in the document library.
- Increase or decrease the number of columns displayed.
- Choose the columns by which the information will be sorted.

- Filter the items shown in the document library according to criteria you specify.
- Add a button that enables team members to edit the document library.
- Display check boxes next to individual items so that members can select multiple files.
- Group similar files.
- Add totals for items in the document library columns.
- Apply a style to the document library.
- Choose whether or not files are displayed in folders.
- Set a limit for the number of items that can be displayed in the document library list.
- Set the way you want the document library to appear when viewed on a mobile device.


Edit View - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/ViewEdit.aspx?List=4b5e6896%2D49ad%2D4bc5%
Bing
Favorites
Edit View
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Wide World Consortium Team Site ▸ Team Files ▸ Document Library Settings ▸ Edit View
Team Site
Website
Marketing team
Search
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
OK
Cancel
Columns

To customize this view further, use a Web page editor compatible with Microsoft SharePoint Foundation.

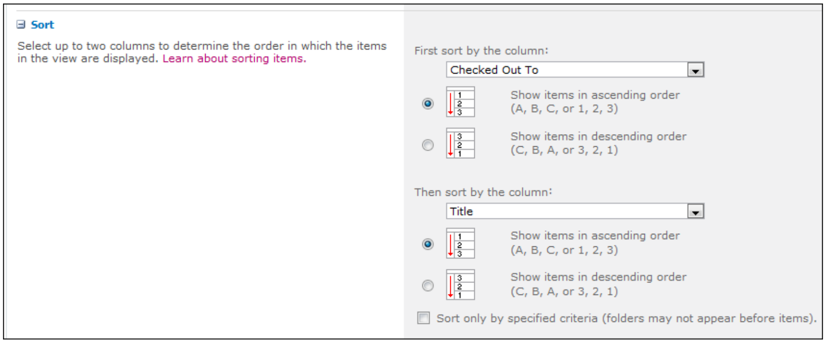
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
☑	Type (icon linked to document)	1
☑	Name (linked to document with edit menu)	2
☑	Modified	3
☑	Modified By	4
☐	Check In Comment	5
☐	Checked Out To	6
☐	Content Type	7
☐	Copy Source	8
☐	Created	9

FIGURE 6-7 You can modify the current view of your document library and change the columns, style, number of items allowed, and more.

You can change the columns in the document library by displaying some and hiding others and by rearranging the order of the columns as they appear in the table. First select the check boxes in the Display column of the items you want to appear. Then, in the Position From Left column, click the arrow and choose the number that indicates the position in the table you want the column to have.

The Sort selection is another setting you can use to ensure that the files appear in the order that makes the most sense for your project. You can choose a primary sort and a secondary sort—this means the files will be sorted by the primary sort first and then by the secondary sort. For example, if you choose Checked Out To as the primary sort, your document library will list all documents by the person they are checked out to. If you select Title as the secondary sort, the documents will be listed alphabetically by title within the Checked Out To grouping.



Sort

Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.

First sort by the column: Checked Out To

● Show items in ascending order (A, B, C, or 1, 2, 3)

○ Show items in descending order (C, B, A, or 3, 2, 1)

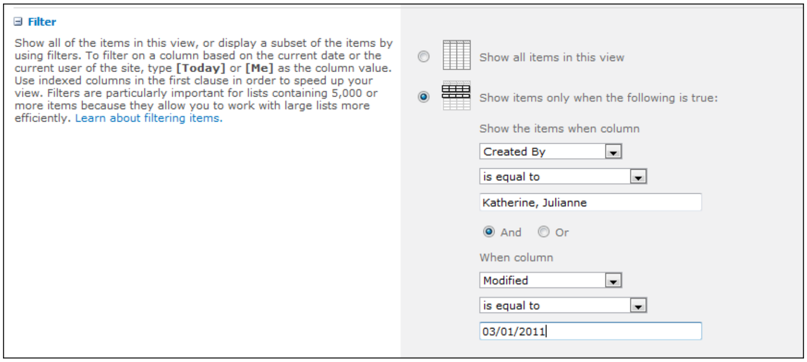
Then sort by the column: Title

● Show items in ascending order (A, B, C, or 1, 2, 3)

○ Show items in descending order (C, B, A, or 3, 2, 1)

☐ Sort only by specified criteria (folders may not appear before items).

Filters enable you to choose which items will appear in the document library list. For example, you might filter the files so that only files posted in the last month appear in the list. Or you could show only files that have been posted by certain members of your team.



Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. Learn about filtering items.

○ Show all items in this view

● Show items only when the following is true:

Show the items when column

Created By

is equal to

Katherine, Julianne

● And ○ Or

When column

Modified

is equal to

03/01/2011

Another item you might want to experiment with as you're setting up your document library is the Style feature. SharePoint Online starts out displaying the library in default view, which is a simple design with no color shading at all. The other styles available in Modify View are Basic Table, Document Details, Newsletter, Newsletter No Lines, Shaded, and Preview Pane. Table 6-1 tells you a little more about the various designs you'll get when choosing the various library styles.

TABLE 6-1 Choosing a Document Library Style

Library Style	Description
Basic Table	The same view as Default view
Document Details	Shows each file in its own box with its file name, date modified, and modified by information
Newsletter	Lists files separated by lines, with an Edit button for each entry
Newsletter, no lines	Lists files without lines separating them, and includes an Edit button
Shaded	Displays shading in every other row of the document library
Preview Pane	Lists the files on the left, and displays the information for each file as you point to it

After you make your modification changes in Modify View, simply click OK to return to your document library and take a look at the changes you've made. If you aren't happy with the changes or want to try something different, simply click the top of the document library again to display the Library Tools tab and return to Modify View to make your additional changes.

DO YOU NEED TO USE SHAREPOINT DESIGNER?

Office 365 is designed to be easy to use and customize without a lot of technical know-how. You don't have to be a programmer to get the best use of all the features available to you. That's a good thing.

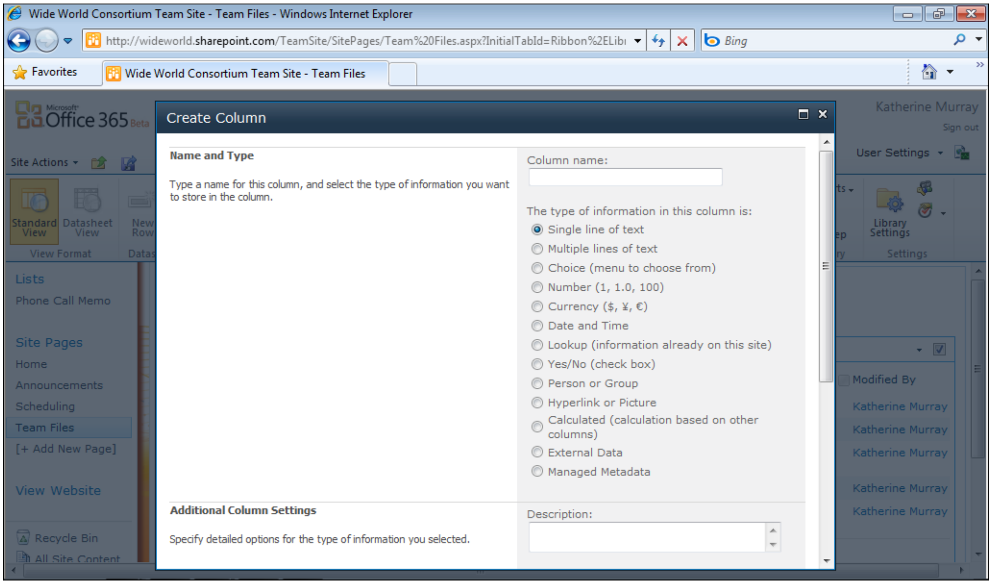
But what if you're comfortable designing websites and you'd like to have a little more design control over what goes where on the page? SharePoint Online enables you to open your page and work with the design directly in SharePoint Designer if you choose. You'll find this option in the Modify View list and also as an option in the Site Actions list.

SharePoint Designer is available as a free download from the Microsoft Download Center at *www.microsoft.com/downloads*, so if you try it and decide not to use it after all—no harm done. You might just find, however, that it's easy enough to use that you enjoy tweaking your team pages and having a bit more flexibility than the web-based design tools offer you.

Adding a New Column to the Document Library

Maybe the basic layout of the table is fine and you want to leave much of the information the way it is. But suppose that it's missing a column that shows which department created the file. You can add a new column easily by clicking the document library to display the Library Tools Library tab. Then click Create Column in the Manage Views group.

When the Create Column dialog box appears, as shown in Figure 6-8, type a name for the new column and choose the item that reflects the type of information you'll be storing in that column. For a department name, the default setting—Single Line Of Text—works fine. But you can also add a picture (perhaps a team member's profile picture) using the Hyperlink Or Picture setting, or create a menu of choices using the Choice item.


Wide World Consortium Team Site - Team Files - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/SitePages/Team%20Files.aspx?InitialTabId=Ribbon%2ELibr
Bing
Favorites
Wide World Consortium Team Site - Team Files
Office 365 Beta
Katherine Murray
Sign out
Site Actions
User Settings
Standard View
Datasheet View
New Row
View Format
Library Settings
Settings
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Modified By
Katherine Murray
Katherine Murray
Katherine Murray
Katherine Murray
Katherine Murray
Create Column

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ● Single line of text
- ○ Multiple lines of text
- ○ Choice (menu to choose from)
- ○ Number (1, 1.0, 100)
- ○ Currency ($, ¥, €)
- ○ Date and Time
- ○ Lookup (information already on this site)
- ○ Yes/No (check box)
- ○ Person or Group
- ○ Hyperlink or Picture
- ○ Calculated (calculation based on other columns)
- ○ External Data
- ○ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

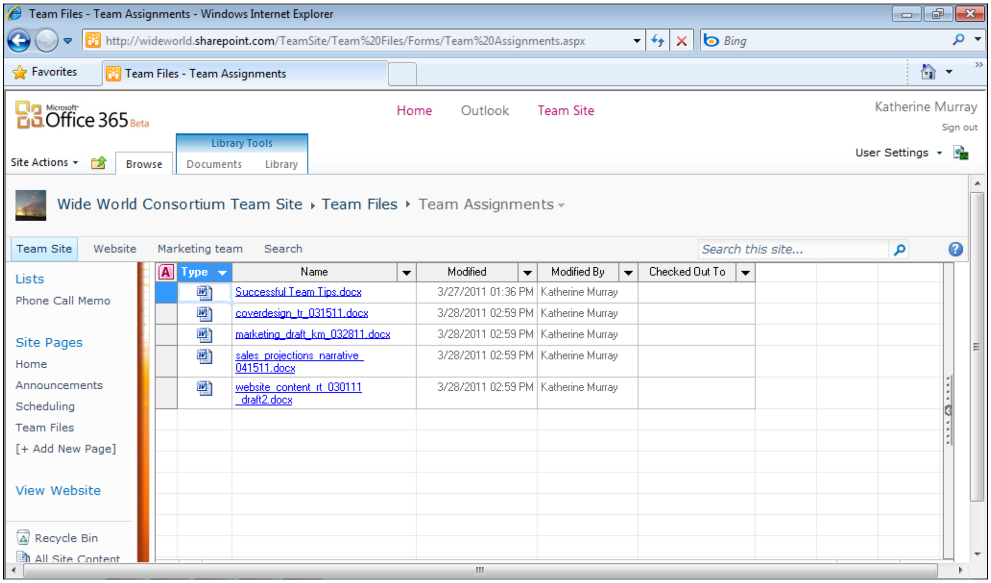
FIGURE 6-8 Enter the name, and choose the type of information you'll display in the new column.

In the Additional Column Settings area, you can type an additional description and choose whether you want to require that the new column contain information. You can also limit the number of characters entered in the column, add the column to the default view, and enter a formula if you want the data in the column to be validated.

Creating a New View for Your Document Library

Although you might not need to get too fancy with the ways you store your files in SharePoint Online, the program includes a large variety of features you can use to customize the information displayed in the table. You can create your own views and create the document library style that best fits your needs.

Note that the view you create for your document library isn't an either/or choice, however—it's both/and. You can have a regular document library view as well as a datasheet and calendar view, all using the same data. For example, Figure 6-9 shows a datasheet view that has been created for the document library you saw earlier in this chapter.


Team Files - Team Assignments - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Team%20Files/Forms/Team%20Assignments.aspx
Bing
Favorites
Team Files - Team Assignments
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Library Tools
Site Actions
Browse
Documents
Library
Wide World Consortium Team Site
Team Files
Team Assignments
Team Site
Website
Marketing team
Search
Search this site...
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content

Type	Name	Modified	Modified By	Checked Out To
	Successful Team Tips.docx	3/27/2011 01:36 PM	Katherine Murray	
	coverdesign_tr_031511.docx	3/28/2011 02:59 PM	Katherine Murray	
	marketing_draft_km_032811.docx	3/28/2011 02:59 PM	Katherine Murray	
	sales_projections_narrative_041511.docx	3/28/2011 02:59 PM	Katherine Murray	
	website_content_rt_030111_draft2.docx	3/28/2011 02:59 PM	Katherine Murray	

FIGURE 6-9 You can create a new view to show your files in different ways.

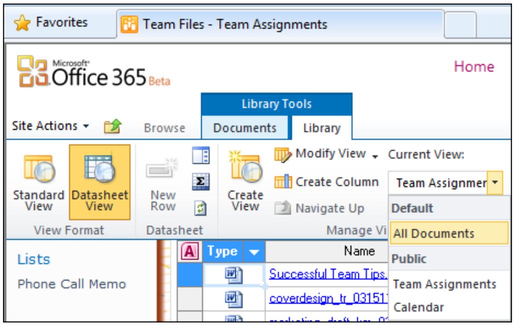
To create a new view for your document library, follow these steps:

1. Click the top of the document library to display the Library Tools tab.
2. Click the Library tab.
3. In the Manage Views group, click Create View.
4. In the Choose A View Format area, choose the type of view you want to create (Standard, Calendar, Access, Datasheet, Gantt, or Custom view).
5. Type a name for the new view.

6. Choose whether you'll share this view with the public or view it yourself.
7. Specify other settings related to the view type you selected, and click OK.

Switching Views

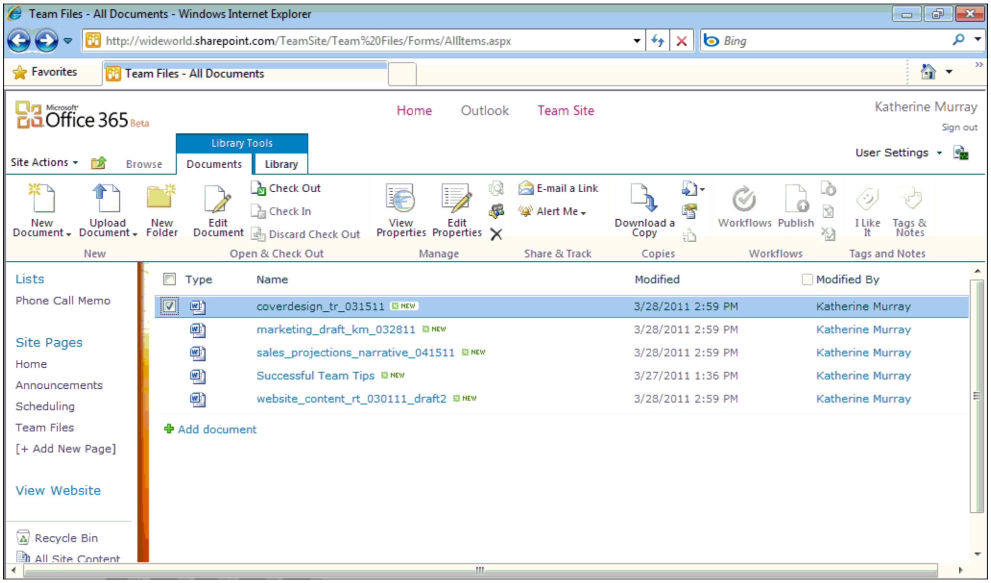
After you create new views, you need to be able to switch among their display easily. Here again, you go to the Library Tools Library tab, in the Manage Views group. Click the Current View arrow to display a list of available views, and click the one you want to see. It's that simple.


Favorites
Team Files - Team Assignments
Microsoft Office 365 Beta
Home
Library Tools
Site Actions
Browse
Documents
Library
Standard View
Datasheet View
View Format
New Row
Datasheet
Create View
Modify View
Create Column
Navigate Up
Manage Vi
Current View:
Team Assignmer
Default
All Documents
Public
Team Assignments
Calendar
Lists
Phone Call Memo
Type
Name
Successful Team Tips
coverdesign_tr_03151

Working with Document Library Files

After you post your files in the document library, you can easily add to them, edit them, check them in and out, download copies of them, and set alerts so that you know whenever a new version of the file is posted to the space.

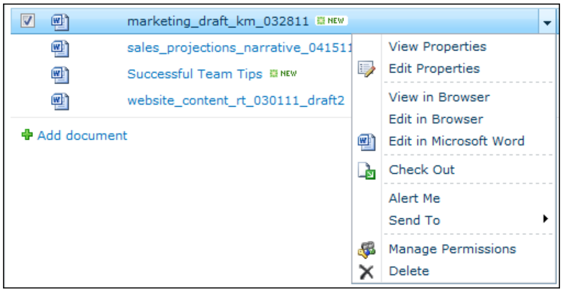
The Library Tools Documents tab appears when you click one of the files in your document library. The various groups—New, Open & Check Out, Manage, Share & Track, Copies, Workflows, and Tags And Notes—give you different sets of tools to use for editing, managing, saving, updating, and working with versions of the file. (See Figure 6-10.) Having these various tools to choose from helps you and your team members keep your files well organized so that everyone can stay as productive as possible by always working with the latest version of the file.


Team Files - All Documents - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Team%20Files/Forms/AllItems.aspx
Bing
Favorites
Team Files - All Documents
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Library Tools
Site Actions
Browse
Documents
Library
New Document
Upload Document
New Folder
New
Edit Document
Check Out
Check In
Discard Check Out
Open & Check Out
View Properties
Edit Properties
Manage
E-mail a Link
Alert Me
Share & Track
Download a Copy
Copies
Workflows
Publish
Workflows
I Like It
Tags & Notes
Tags and Notes
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Add document

☐ Type	Name	Modified	☐ Modified By
☑	coverdesign_tr_031511 NEW	3/28/2011 2:59 PM	Katherine Murray
	marketing_draft_km_032811 NEW	3/28/2011 2:59 PM	Katherine Murray
	sales_projections_narrative_041511 NEW	3/28/2011 2:59 PM	Katherine Murray
	Successful Team Tips NEW	3/27/2011 1:36 PM	Katherine Murray
	website_content_rt_030111_draft2 NEW	3/28/2011 2:59 PM	Katherine Murray

FIGURE 6-10 The Library Tools Documents tab has what you need to add, edit, and work with individual files.

In addition to using the tools in the tab, you can display a list of action choices by hovering the cursor over a file and clicking the arrow that appears on the right side of the Name column. These choices enable you to view or edit the properties of the file, edit the content of the file, check the file out so that you can work on it, create an alert so that you're notified when the file is changed, move the file to another location, manage permissions for the file, or delete the file.


☑ marketing_draft_km_032811 NEW
sales_projections_narrative_041511
Successful Team Tips NEW
website_content_rt_030111_draft2
Add document
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Alert Me
Send To
Manage Permissions
Delete

Adding a New Library Folder

Although you can set the number of files listed in the document library, at some point it becomes counterproductive to scroll through a list of 50 files, trying to find just the one you need. Similar to the way you manage files on your home or office computer, you can use folders in SharePoint Online to group files and make it easy to find the file you need.

To add a folder to a document library, follow these steps:

1. Display the page with the document library you want to change.
2. Click the library to display the Library Tools tab.
3. Click the Documents tab.
4. Click New Folder in the New group.
5. In the New Folder dialog box, type a name for the new folder and click Save.

The new folder appears at the top of the file list with the name you specified. You can change the settings for the folder (for example, rename it) or remove it by pointing to the folder name and clicking the arrow that appears on the right side of the Name column.

Tip

Starting a New Document

You'll learn more about working with Office 2010 Web Apps in Chapter 8, "Working with Office 2010 Web Apps," but you can easily begin and work with documents directly from the SharePoint document library. This makes it super simple to check on something in a file, talk about changes while you're online with your team, or just dive in and begin creating what you're thinking about while you're thinking about it.

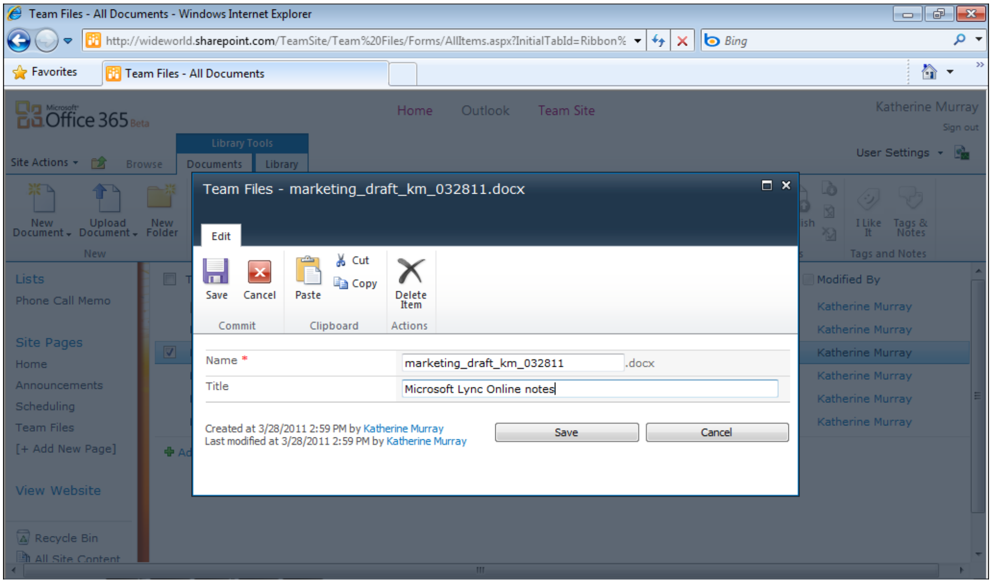
To start a new document in SharePoint Online, click the document library and click New Document in the New group on the far left side of the Library Tools Documents tab. Click New Document, and a new blank document opens in Microsoft Word. A message box appears reminding you that some files may be harmful and asking you to verify that you want to download the file. Click OK and then click Enable Editing to begin working in the new document. These protection features are part of Office 2010 and are designed to safeguard you against potentially harmful files you might download from the Internet. After you enable editing on the document from your team site, however, Office adds the site to your trusted locations and you shouldn't need to click Enable Editing again.

Tip

Viewing File Properties

File properties are simple to use in SharePoint Online. You can easily view and change the file properties—which include essentially the file name and the title—by selecting the check box of the file on the far left side of the document library and clicking either View Properties or Edit Properties in the Manage group on the Library Tools Documents tab.

In the Properties dialog box that appears when you click Edit Properties, you can rename the file or type a new title. (See Figure 6-11.) Additionally you can delete the file if you'd like by clicking Delete Item.


Team Files - All Documents - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Team%20Files/Forms/AllItems.aspx?InitialTabId=Ribbon%
Bing
Favorites
Team Files - All Documents
Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
Library Tools
Documents
Library
New Document
Upload Document
New Folder
New
I Like It
Tags & Notes
Tags and Notes
Lists
Phone Call Memo
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Modified By
Katherine Murray
Katherine Murray
Katherine Murray
Katherine Murray
Katherine Murray
Katherine Murray
Team Files - marketing_draft_km_032811.docx
Edit
Save
Cancel
Paste
Cut
Copy
Delete Item
Commit
Clipboard
Actions
Save
Cancel

Name * marketing_draft_km_032811 .docx

Title Microsoft Lync Online notes

Created at 3/28/2011 2:59 PM by Katherine Murray
Last modified at 3/28/2011 2:59 PM by Katherine Murray

FIGURE 6-11 You can easily view and edit file properties to rename, retitle, or delete the file.

Checking Out and Checking In Files

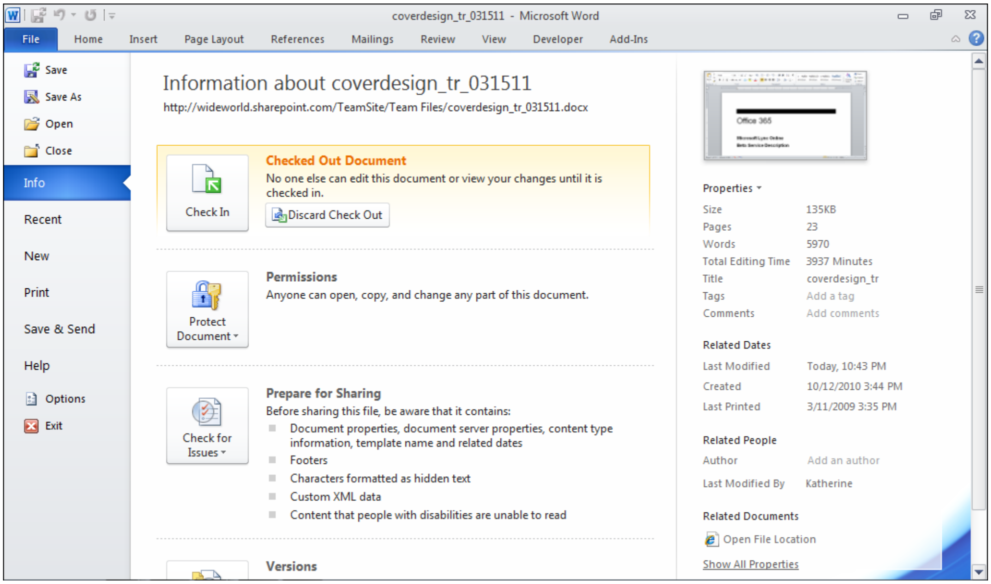
When you're working as part of a team and sharing a workspace, having a mechanism in place that ensures people are always working with the most recent versions of shared files is very important. SharePoint Online does this by enabling you to check files out, work on them, and then check them in so that other members of your team can continue the work.

When you want to check a file out, follow these steps:

1. Select the check box of the file you want to check out.
2. In the Library Tools Documents tab, click Check Out in the Open & Check Out group.
3. A popup box warns you that you're about to check out the file. Select the Use My Local Drafts Folder check box if you want to store the file in a folder used to synchronize it with your online files.
4. Click OK.

> If you select the Use My Local Drafts Folder check box, you might see a message telling you that this feature will not work with Internet Explorer until you add your SharePoint Online site to your Trusted Sites Zone in Internet Explorer. If you get this message, cancel the checkout operation for now, make the change in Internet Explorer, and restart Internet Explorer. Then come back and check out the file as you originally intended.

You can then edit and save the file normally, and when you're ready to check it back in to your team site, click the File tab and choose Info. At the top of the center area of the Info tab in Backstage view, you can see that the file is still part of the online team site. At the top of the center column, the Office application lets you know that the file is currently checked out, and it gives you the option of either discarding the checked-out status (which means your changes won't be made in the file online) or clicking Check In to return the file to the team site. (See Figure 6-12.)


coverdesign_tr_031511 - Microsoft Word
File
Home
Insert
Page Layout
References
Mailings
Review
View
Developer
Add-Ins
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit
Check In
Discard Check Out
Protect Document
Check for Issues
Open File Location
Show All Properties

Information about coverdesign_tr_031511

http://wideworld.sharepoint.com/TeamSite/Team Files/coverdesign_tr_031511.docx

Checked Out Document

No one else can edit this document or view your changes until it is checked in.

Permissions

Anyone can open, copy, and change any part of this document.

Prepare for Sharing

Before sharing this file, be aware that it contains:

- Document properties, document server properties, content type information, template name and related dates
- Footers
- Characters formatted as hidden text
- Custom XML data
- Content that people with disabilities are unable to read

Versions

Properties

Size	135KB
Pages	23
Words	5970
Total Editing Time	3937 Minutes
Title	coverdesign_tr
Tags	Add a tag
Comments	Add comments

Related Dates

Last Modified	Today, 10:43 PM
Created	10/12/2010 3:44 PM
Last Printed	3/11/2009 3:35 PM

Related People

Author	Add an author
Last Modified By	Katherine

Related Documents

FIGURE 6-12 You can check in the file directly from the Office application you're using.

After you check in the file, other team members can see the changes you've made and work on the file themselves if necessary.

Setting Alerts

Another reality of working collaboratively on a team is that you must know who is uploading what document when. Especially if you're concerned about the deadlines you're facing, knowing that documents are being posted on time helps keep your stress level down and your team moving forward.

You can set alerts in the site so that you receive a message whenever specific files are updated or when changes are made to the team site in general. To set alerts, follow these steps:

1. Display the document library where you want to set alerts.
2. Select the check box of a file if you want to be alerted about a specific document.
3. Click Alert Me in the Share & Track group of the Library Tools Documents tab.
4. Choose Set Alert On This Document.
5. In the New Alert dialog box, enter the names of people you want to receive the alerts, and then choose the delivery method. (You can enter your email address or your mobile phone number if you prefer a text message.)
6. Choose the type of changes you want to be alerted about (all changes, changes made by others, changes made on a document you created, or changes made on a document you last modified).
7. Choose whether you want to get alerts immediately, receive a daily summary, or get a weekly summary. You can also choose the time of day you receive the alerts.
8. Click OK to save the alert.

Tip

What's Next

Organizing, managing, and working with your files successfully is likely to be a major part of your work in SharePoint Online. This chapter showed you how to set up the document libraries in your site so that they include the information you want them to display, are easy to use and manage, and give you easy access to the types of tasks you want to accomplish with your files. The next chapter takes you a step further in SharePoint Online by showing you how to keep your team moving in the right direction by creating and managing workflows.

CHAPTER 7

Adding and Managing Workflows

IN THIS CHAPTER:

- Introducing Office 365 workflows
- Creating a new workflow
- Using a workflow for your project
- Managing workflows

WHETHER YOU KNOW IT or not, you use workflows all the time. They might not be written down, and others might not follow the same process (which might or might not cause you lots of headaches), but there is some kind of flow to the work you're doing. Whether you're publishing an annual report, getting a mailing out, launching a new Web site, or trying to support a sales force, the tasks you complete in your day fit into a larger work process that can be mapped and organized.

Workflows in the traditional sense are logical structures that help you know who does what when in the work process. When you're working with a team, workflows can help keep a project on track and help you see easily which team member is responsible for tasks at any given time. SharePoint Online in Office 365 makes it easy for you to create and apply workflows to the team projects you create. This chapter shows you how to create and use a workflow to keep your team engaged and working smoothly together.

Introducing Office 365 Workflows

Your SharePoint Online team site offers all kind of features and tools you can use to keep your team on track. Creating workflows for processes you use often—especially if they involve customer interactions or important project tasks or documents—can help you reduce the amount of time you spend worrying about getting things done.

To add a workflow to your team site, you need to first create a library or a list that includes a Choices column (which enables you to set the state of each item in the workflow). The basic idea is captured in the following steps:

1. You create a list of the tasks you need to accomplish to reach completion on a particular goal.
2. You create a workflow for that list that enables you to indicate when a task has been completed and whose involvement is needed next.
3. The workflow can notify that team member automatically by email to let him or her know it is time for his or her task in the project.
4. When all tasks are marked as finished, the workflow is complete.

> You might want to use the Issues Tracking list template in SharePoint Online to create a list you can use with a workflow. You can also use the Custom List or a document library to create a customized list that you can use as the basis for the workflow, but for the workflow to work properly, you must include at least one Choice field that enables you to set multiple options. The Choice field is where you set the three different states (Active, Resolved, and Completed) the workflow uses to track the progress of the tasks.

The workflows you create help you easily coordinate the people, tasks, and deadlines on your different projects. By enlisting SharePoint Online to help you track the project's status, you can make sure things stay on schedule and that the right people are involved at the right points.

HOW WILL YOU USE WORKFLOWS?

A workflow does require a little forethought and planning when you set it up, but it can save you time and trouble if you have a number of people all working on different parts of the same process. You could use workflows to

- Follow a call for customer service from the initial contact to the resolution
- Track client inquiries about a new product

- Organize the process you use to create the annual report, from brainstorming to finishing the product
- Ensure that each new employee receives training from various members of your team

Whether you want to track tasks or files in a library, SharePoint Online makes creating and updating the workflow a simple matter of changing the status of tasks as you complete them.

Creating a New Workflow

A workflow is a process you attach to a list of steps you want to accomplish or a series of document tasks you want to complete in a certain sequence. When you want to create a workflow, you begin by creating the list or library you'll use as the basis for the workflow:

1. To create the list or library the workflow will use, click Site Actions, choose View All Site Content, and click Create. Click Library or List, and choose Issue Tracking List. Type a name for the list or library, and click Create.
2. Click on the List Tools List tab, and click the Workflow Settings tool in the Settings group. (See Figure 7-1.)

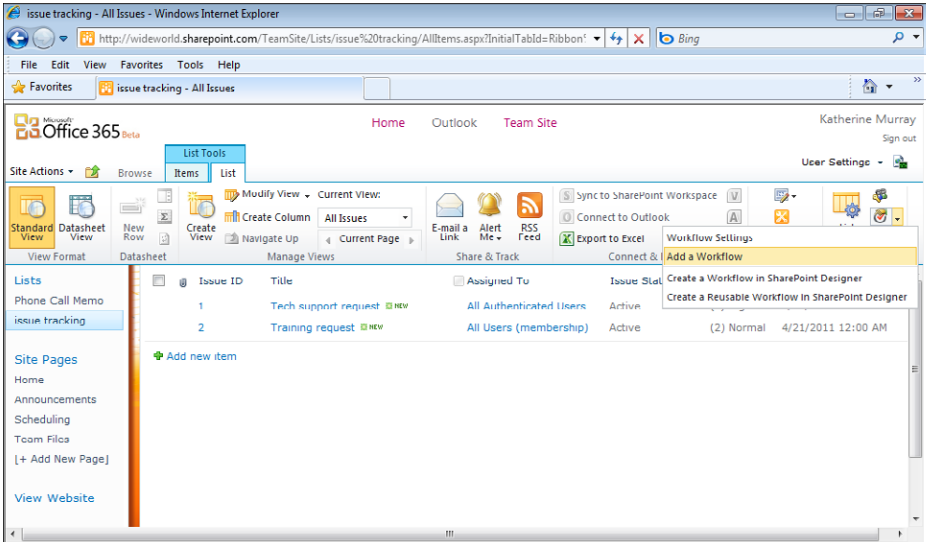
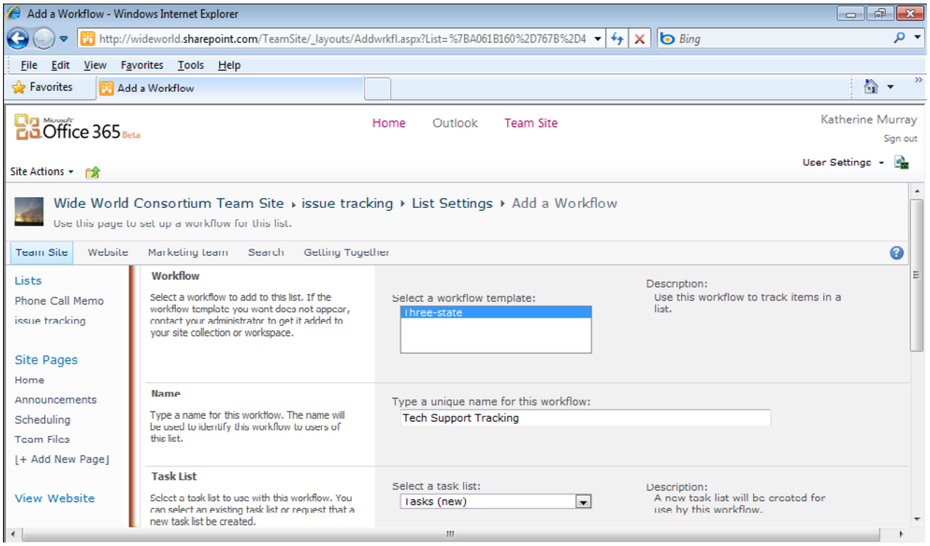

issue tracking - All Issues - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Lists/issue%20tracking/AllItems.aspx?InitialTabId=Ribbon
Bing
File Edit View Favorites Tools Help
Favorites
issue tracking - All Issues
Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
List Tools
Site Actions
Browse
Items
List
Standard View
Datasheet View
View Format
New Row
Datasheet
Create View
Modify View
Create Column
Navigate Up
Current View:
All Issues
Current Page
Manage Views
E-mail a Link
Alert Me
RSS Feed
Share & Track
Sync to SharePoint Workspace
Connect to Outlook
Export to Excel
Connect &
Workflow Settings
Add a Workflow
Create a Workflow in SharePoint Designer
Create a Reusable Workflow in SharePoint Designer
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Issue ID
Title
Assigned To
Issue Status
1
Tech support request NEW
All Authenticated Users
Active
2
Training request NEW
All Users (membership)
Active
(2) Normal
4/21/2011 12:00 AM
Add new item

FIGURE 7-1 After you create an Issue Tracking list, click Workflow Settings in the Settings group of the List Tools List tab.

3. Click Add A Workflow.
4. In the Add A Workflow screen, leave the workflow template (Three-state) selected as shown in Figure 7-2. Type a name for the workflow, such as Tech Support Tracking.
5. In the Task List area, you can choose a task list you want to associate with the workflow or elect to create a new task list. If you don't have any other task lists created in the site, SharePoint Online defaults to creating a new list.


Add a Workflow - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/Addwrkfl.aspx?List=%7BA061B160%2D767B%2D4
Bing
File Edit View Favorites Tools Help
Favorites
Add a Workflow
Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
Site Actions
User Settings
Team Site
Website
Marketing team
Search
Getting Together
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website

Wide World Consortium Team Site ▸ issue tracking ▸ List Settings ▸ Add a Workflow

Use this page to set up a workflow for this list.

Workflow

Select a workflow to add to this list. If the workflow template you want does not appear, contact your administrator to get it added to your site collection or workspace.

Select a workflow template: Three-state

Description: Use this workflow to track items in a list.

Name

Type a name for this workflow. The name will be used to identify this workflow to users of this list.

Type a unique name for this workflow: Tech Support Tracking

Task List

Select a task list to use with this workflow. You can select an existing task list or request that a new task list be created.

Select a task list: Tasks (new)

Description: A new task list will be created for use by this workflow.

FIGURE 7-2 Type a name, and choose a list for the new workflow.

6. In the History List area, choose the name of the workflow history list you want to use from the list. Again, if you haven't created one previously, SharePoint Online will add one by default.
7. Choose how the workflow will be started by selecting the option box that best fits your process. By default, any user who has editing privileges is able to create a new workflow. You can limit this to only users with Manage Lists Permissions by selecting the check box if you like.

Tip

8. Click Next.

Setting Workflow States

The Workflow states enable you to indicate the progress you're making on an issue in your workflow. The states you create might vary, depending on the type of work you're doing. For example, if you're tracking a grant proposal process, you might create workflow states that relate to the three main steps in your grant submission process:

- Research completed
- Letter of inquiry submitted
- Grant proposal submitted

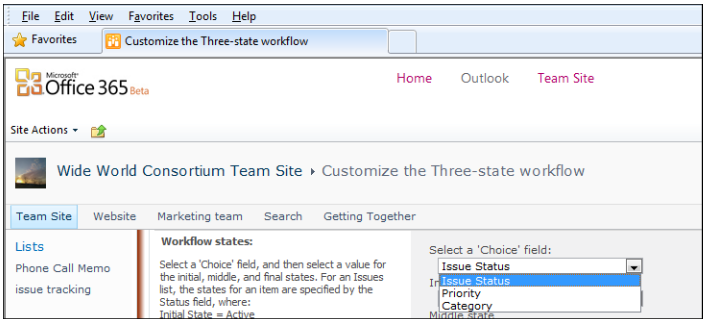
If you're tracking technical support issues, you might create states such as the following:

- Active request
- In progress
- Completed

Or if you're tracking sales calls, your states might look like this:

- Request received
- Appointment scheduled
- Completed

In the Workflow States area, begin by choosing the field you'd like to set up as your Choices field. In the example shown in Figure 7-3, the issue-tracking table includes three fields that offer multiple choices, which means they can be used for the workflow.


File Edit View Favorites Tools Help
Favorites
Customize the Three-state workflow
Microsoft Office 365 Beta
Home
Outlook
Team Site
Site Actions
Wide World Consortium Team Site › Customize the Three-state workflow
Team Site
Website
Marketing team
Search
Getting Together
Lists
Phone Call Memo
issue tracking
Issue Status
Issue Status
Priority
Category
In
Middle state

Workflow states:

Select a 'Choice' field, and then select a value for the initial, middle, and final states. For an Issues list, the states for an item are specified by the Status field, where:
Initial State = Active

Select a 'Choice' field: Issue Status

FIGURE 7-3 Choose a field that contains the values you want to use to track items in the workflow.

Tip

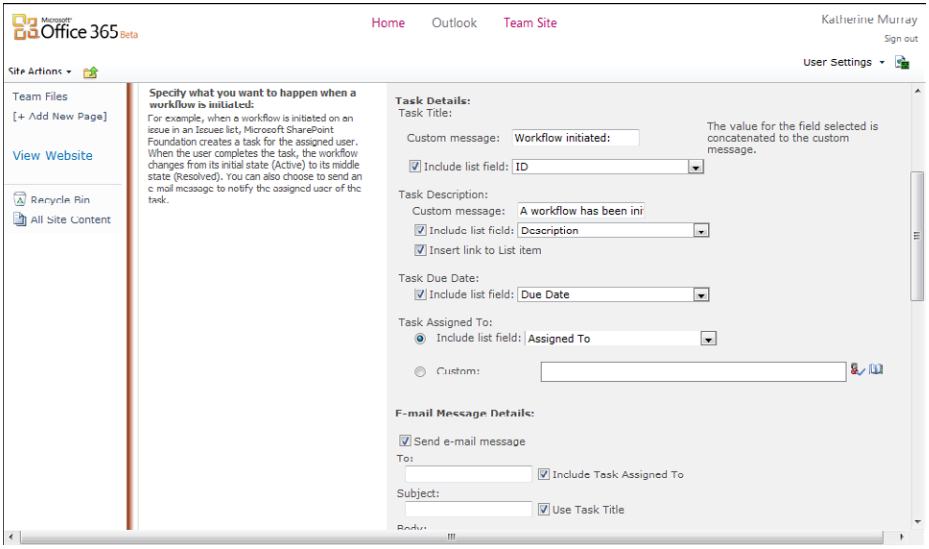
Specifying Task Details

Your next step involves telling the workflow what you want to be generated when the workflow is created. In this section, you specify which fields you want the custom message to include; enter a task description; choose whether you want to include the date the task was modified, created, or assigned; and determine who to include in the details of the task. To complete this section, follow these steps:

1. Click in the Custom Message text box, and type the title text you want to be generated when the workflow is created. (See Figure 7-4.)
2. In the Include List Field selection, click the arrow and select the name of the field you want to be added to the Custom Message entry.

Tip

3. Next type the text you want to be displayed that describes the task, and click the Insert Link To List Item if you want recipients to be able to click directly through to the task.
4. Choose whether you want to include the due date, the date the item was created, or the date the item was modified in the notification message.
5. If you want those receiving the list to see who the task is assigned to or who created or modified the task, click the Task Assigned To arrow and click your selection. If you want to assign the task to a specific person, click in the text box and type the name of the team member to whom you want to assign the task; then click Check Names to have SharePoint Online add the person’s full email address to the box.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
Site Actions
User Settings
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content

Specify what you want to happen when a workflow is initiated:

For example, when a workflow is initiated on an issue in an Issues list, Microsoft SharePoint Foundation creates a task for the assigned user. When the user completes the task, the workflow changes from its initial state (Active) to its middle state (Resolved). You can also choose to send an e-mail message to notify the assigned user of the task.

Task Details:

Task Title:

Custom message: Workflow initiated:

The value for the field selected is concatenated to the custom message.

☑ Include list field: ID

Task Description:

Custom message: A workflow has been ini

☑ Include list field: Description

☑ Insert link to List item

Task Due Date:

☑ Include list field: Due Date

Task Assigned To:

● Include list field: Assigned To

○ Custom:

E-mail Message Details:

☑ Send e-mail message

To:

☑ Include Task Assigned To

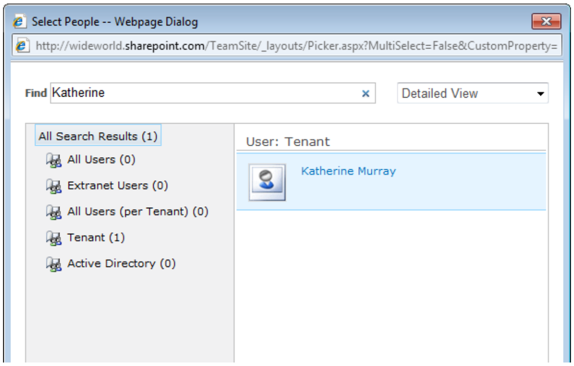
Subject:

☑ Use Task Title

Body:

FIGURE 7-4 Enter the details for the workflow to determine what happens when specific tasks are completed.

If you want to locate a specific user but don't remember the user name the team member uses in Office 365, click Browse to the right of the Custom field in the Task Assigned To area. In the Find box of the Select People dialog box, type the first few characters of the person's name and press Enter. SharePoint Online searches the user list and displays the found user in the preview box on the right. To select the user, click the person's name and click OK.


Select People -- Webpage Dialog
Detailed View

http://wideworld.sharepoint.com/TeamSite/_layouts/Picker.aspx?MultiSelect=False&CustomProperty=

Find Katherine

All Search Results (1)
- All Users (0)
- Extranet Users (0)
- All Users (per Tenant) (0)
- Tenant (1)
- Active Directory (0)

User: Tenant

Katherine Murray

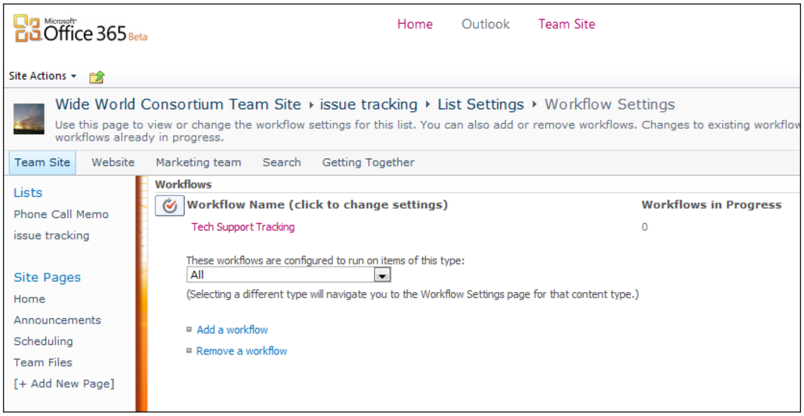
6. In the E-mail Message Details section, you tell the workflow whether to generate an email message automatically and, if so, which pieces of information you want to include. Select the Send E-Mail Message check box to send the message, and either type the information in the To and Subject fields or leave Include Task Assigned To and Use Task Title selected to include those information items automatically.
7. In the Body area, leave Insert Link To List Item selected if you want only to send the link to the triggered task. Alternately, you can type a message to let the recipients know what you want them to do with the task.
8. Repeat steps 3 through 7, choosing your options and specifying behaviors that are carried out when the middle task in the workflow is triggered.
9. Click OK to finish creating the workflow.

After you finish creating the workflow, you're taken back to your Issues Tracking list. The workflow will be applied to your project when you create the next task in the process.

Editing Your Workflow

If you want to change the workflow settings you have selected, click the Issue Tracking list in the left navigation panel. Display the List Tools List tab and then follow these steps:

1. Click Workflow Settings in the Settings group on the far right side of the ribbon.
2. Choose Workflow Settings.
3. In the Workflows screen (shown in Figure 7-5), click the name of the workflow you want to change.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Site Actions
Team Site
Website
Marketing team
Search
Getting Together
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
Add a workflow
Remove a workflow

Wide World Consortium Team Site ▸ issue tracking ▸ List Settings ▸ Workflow Settings

Use this page to view or change the workflow settings for this list. You can also add or remove workflows. Changes to existing workflow
workflows already in progress.

Workflows

Workflow Name (click to change settings)	Workflows in Progress
Tech Support Tracking	0

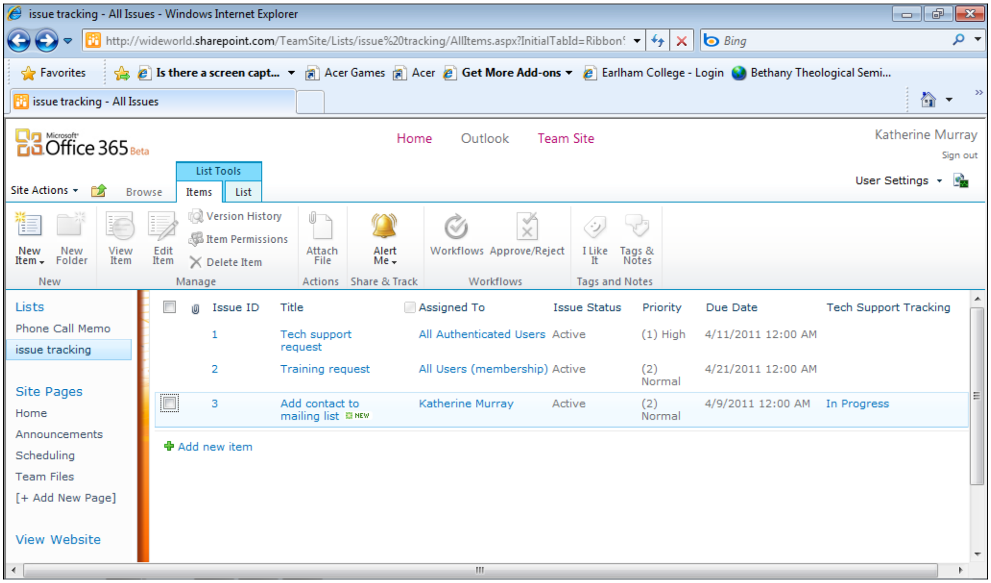
These workflows are configured to run on items of this type:
All
(Selecting a different type will navigate you to the Workflow Settings page for that content type.)

FIGURE 7-5 Display Workflow Settings, and click the name of the workflow you want to change.

The workflow settings appear so that you can make changes to your previous settings and resave the workflow with your current changes intact.

Using a Workflow for Your Project

If you selected the Start This Workflow When A New Item Is Created check box when you first created the workflow, the workflow is initiated automatically as soon as you create a new task. You can see the workflow in action by clicking Issue Tracking (or the customized name of the list you created) in the left navigation panel and reviewing the tasks in the list. In the right-most column, named for the workflow you created, the task shows the status of the workflow as In Progress. (See Figure 7-6.)

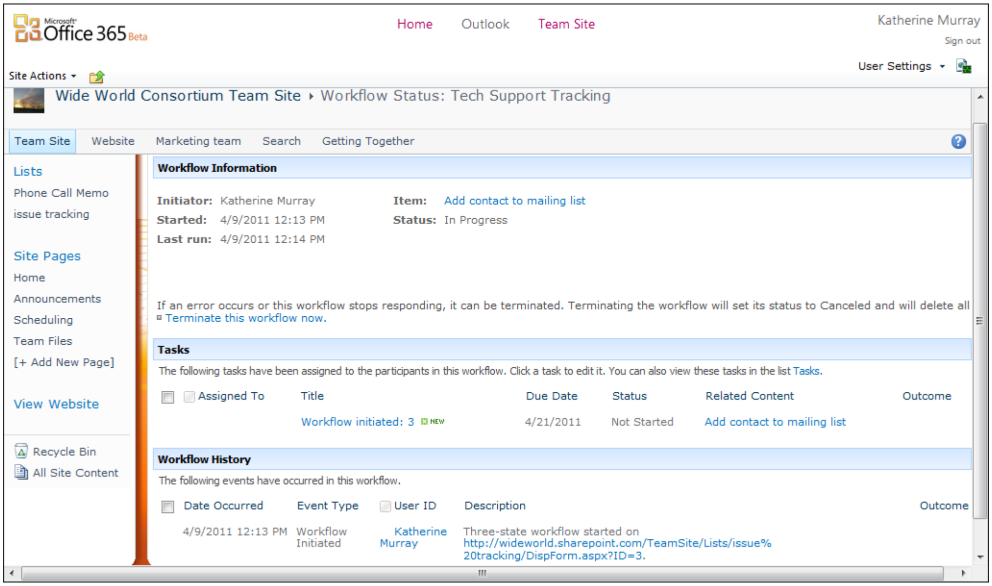

issue tracking - All Issues - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Lists/issue%20tracking/AllItems.aspx?InitialTabId=Ribbon
Bing
Favorites
Is there a screen capt...
Acer Games
Acer
Get More Add-ons
Earlham College - Login
Bethany Theological Semi...
issue tracking - All Issues
Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
List Tools
Items
List
New Item
New Folder
New
View Item
Edit Item
Version History
Item Permissions
Delete Item
Manage
Attach File
Actions
Alert Me
Share & Track
Workflows
Approve/Reject
Workflows
I Like It
Tags & Notes
Tags and Notes
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Add new item

☐	Issue ID	Title	Assigned To	Issue Status	Priority	Due Date	Tech Support Tracking
	1	Tech support request	All Authenticated Users	Active	(1) High	4/11/2011 12:00 AM	
	2	Training request	All Users (membership)	Active	(2) Normal	4/21/2011 12:00 AM	
☐	3	Add contact to mailing list NEW	Katherine Murray	Active	(2) Normal	4/9/2011 12:00 AM	In Progress

FIGURE 7-6 The Issue Tracking list shows that the workflow has been initiated.

Checking Workflow Status

You can click In Progress to display the Workflow Information screen, which gives you an overview of the active workflow. You can see who created the workflow, the date on which it started, the item in process, and the tasks affiliated with the workflow. (See Figure 7-7.)


Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
Site Actions
User Settings
Team Site
Website
Marketing team
Search
Getting Together
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content

Wide World Consortium Team Site ▸ Workflow Status: Tech Support Tracking

Workflow Information

Initiator: Katherine Murray
Started: 4/9/2011 12:13 PM
Last run: 4/9/2011 12:14 PM
Item: Add contact to mailing list
Status: In Progress

If an error occurs or this workflow stops responding, it can be terminated. Terminating the workflow will set its status to Canceled and will delete all

▫ Terminate this workflow now.

Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list Tasks.

☐	☐ Assigned To	Title	Due Date	Status	Related Content	Outcome
		Workflow initiated: 3 NEW	4/21/2011	Not Started	Add contact to mailing list	

Workflow History

The following events have occurred in this workflow.

☐	Date Occurred	Event Type	☐ User ID	Description	Outcome
	4/9/2011 12:13 PM	Workflow Initiated	Katherine Murray	Three-state workflow started on http://wideworld.sharepoint.com/TeamSite/Lists/issue%20tracking/DispForm.aspx?ID=3.	

FIGURE 7-7 The Workflow Information area shows you the tasks in the current workflow and gives you information about the history of items in the list.

Completing a Workflow Task

When you finish a task that is part of the workflow, you can mark it as completed by clicking the list name in the left navigation panel. In the displayed list, select the check box of the item you've finished and click the arrow that appears to the right of the task name. A list of options appears, as shown in Figure 7-8. Click Edit Item.

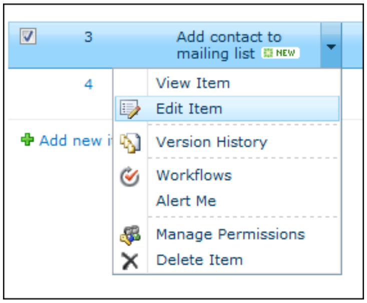
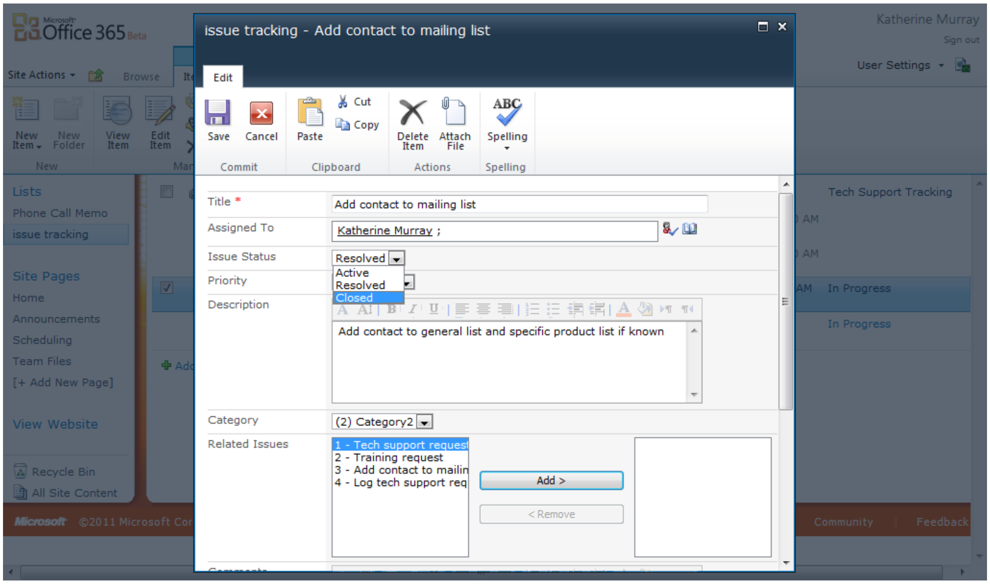

☑ 3 Add contact to mailing list NEW
4
Add new i
View Item
Edit Item
Version History
Workflows
Alert Me
Manage Permissions
Delete Item

FIGURE 7-8 Click Edit Item to display the settings you need to mark a task as complete.

In the task window (similar to the one shown in Figure 7-9), click the issue and choose the option that shows the task has been completed. Scroll down and click Save to save the change. The window closes, and the task list is redisplayed, with the task status updated to show the task has been completed.


Office 365 Beta
Site Actions
Browse
New Item
New Folder
View Item
Edit Item
New
Lists
Phone Call Memo
issue tracking
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
©2011 Microsoft Cor
Katherine Murray
Sign out
User Settings
Tech Support Tracking
In Progress
In Progress
Community
Feedback
Edit
Save
Cancel
Paste
Cut
Copy
Delete Item
Attach File
Spelling
Commit
Clipboard
Actions
Spelling
Active
Resolved
Closed
Add >
< Remove

issue tracking - Add contact to mailing list

Title * Add contact to mailing list

Assigned To Katherine Murray ;

Issue Status Resolved

Priority

Description Add contact to general list and specific product list if known

Category (2) Category2

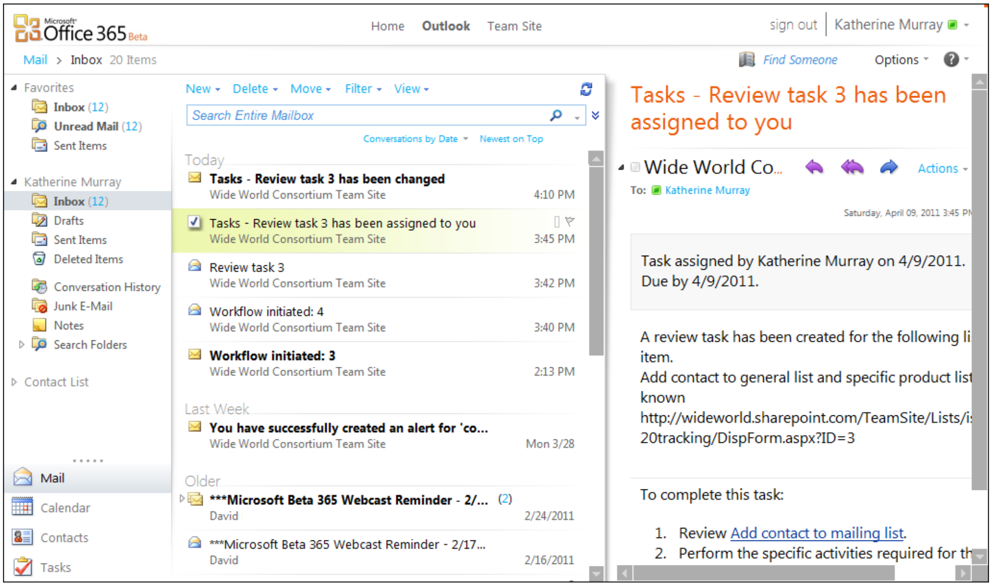
Related Issues
1 - Tech support request
2 - Training request
3 - Add contact to mailin
4 - Log tech support req

FIGURE 7-9 Change the Issue Status setting to show that the task has been completed.

Tip

As workflow tasks are completed, SharePoint Online notifies the team members involved in the next stage of the process by sending email messages (if you selected that option when you were creating the workflow). At any time in the process, you can click Outlook at the top of the Office 365 window to view your email and see whether any notifications have been received.

Depending on the information you said you wanted to include in the notification, the email message might include only the link to the next task, or it might include a custom message, the task title, and other information you might need to display and complete the task. (See Figure 7-10.)


Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 20 Items
Find Someone
Options
Favorites
Inbox (12)
Unread Mail (12)
Sent Items
Katherine Murray
Inbox (12)
Drafts
Sent Items
Deleted Items
Conversation History
Junk E-Mail
Notes
Search Folders
Contact List
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Today
Tasks - Review task 3 has been changed
Wide World Consortium Team Site 4:10 PM
Tasks - Review task 3 has been assigned to you
Wide World Consortium Team Site 3:45 PM
Review task 3
Wide World Consortium Team Site 3:42 PM
Workflow initiated: 4
Wide World Consortium Team Site 3:40 PM
Workflow initiated: 3
Wide World Consortium Team Site 2:13 PM
Last Week
You have successfully created an alert for 'co...
Wide World Consortium Team Site Mon 3/28
Older
***Microsoft Beta 365 Webcast Reminder - 2/... (2)
David 2/24/2011
***Microsoft Beta 365 Webcast Reminder - 2/17...
David 2/16/2011
Wide World Co...
Actions
To: Katherine Murray
Saturday, April 09, 2011 3:45 PM

Tasks - Review task 3 has been assigned to you

Task assigned by Katherine Murray on 4/9/2011. Due by 4/9/2011.

A review task has been created for the following li
item.
Add contact to general list and specific product list
known
http://wideworld.sharepoint.com/TeamSite/Lists/i
20tracking/DispForm.aspx?ID=3

To complete this task:

1. Review Add contact to mailing list.
2. Perform the specific activities required for th

FIGURE 7-10 You can change Outlook in Office 365 to view any workflow notifications you have received.

Stopping a Workflow

Depending on the types of tasks you manage, it's very possible you'll need to create some tasks that are independent of other workflows you might have running. Perhaps you have one workflow that tracks tech support requests and others that organize your training process. When you want to create a task that is independent of a workflow—for example, you want to design a marketing strategy—you can create the task and then stop the workflow for that particular item. Here's how:

1. Click New Item in the New group of the List Tools Items tab.
2. Create the task as normal, entering the task information in the task window. Click Save.
3. In the task list, click the status of the task that is listed in the column on the right side of the window.
4. In the Workflow Information window, click Terminate This Workflow Now.
5. In answer to the prompt window, click OK, and the workflow is removed for that task.

Tip

Managing Workflows

When you have created a number of workflows and they're all running at the same time, you need to be able to review, manage, and update the workflows as needed. Using SharePoint Online, you can display all your current workflows at once—and access them easily to tweak their settings—by following these steps:

1. Click the name of the list you created for the workflow (in this case, Issue Tracking).
2. Click the List Tools List tab.
3. Click the Workflow Settings tool in the Workflows group, and choose Workflow Settings.
4. Current workflows appear in the Workflows list. You can see the number of workflow tasks that are currently logged for each workflow. To review the settings for one of the current workflows, simply click the workflow name.

Note that any changes you make when a workflow is in progress will not be reflected in the current tasks already created.

What's Next

When you're working with a number of different people and coordinating efforts from multiple locations, it's helpful to have a way of tracking the major tasks of your project so that you're sure critical pieces are getting done. This chapter showed you how to add workflows to a list or library to help keep things on track. The next chapter introduces you to Office 2010 Web Apps.

CHAPTER 8

Working with Office 2010 Web Apps

IN THIS CHAPTER:

- A first look at Office Web Apps
- Creating, saving, and closing a new file
- Working with an existing file
- Choosing your tools
- Levels of editing in Office Web Apps
- Co-authoring with Office Web Apps
- Reviewing and editing Excel worksheets
- Working with OneNote notebooks
- What's next

FOR YEARS, WE'VE BEEN purchasing Microsoft Office suites, installing them on our local PCs or servers, and using our favorite applications to accomplish tasks, create documents, and keep things moving. But times are changing. Work is getting more flexible. We're no longer tied to a particular computer on a single desk, in the same office space, day in and day out (thank goodness). Now we can do our work on the move—in a plane, in a coffee shop, on the convention floor, or on the way to a soccer match.

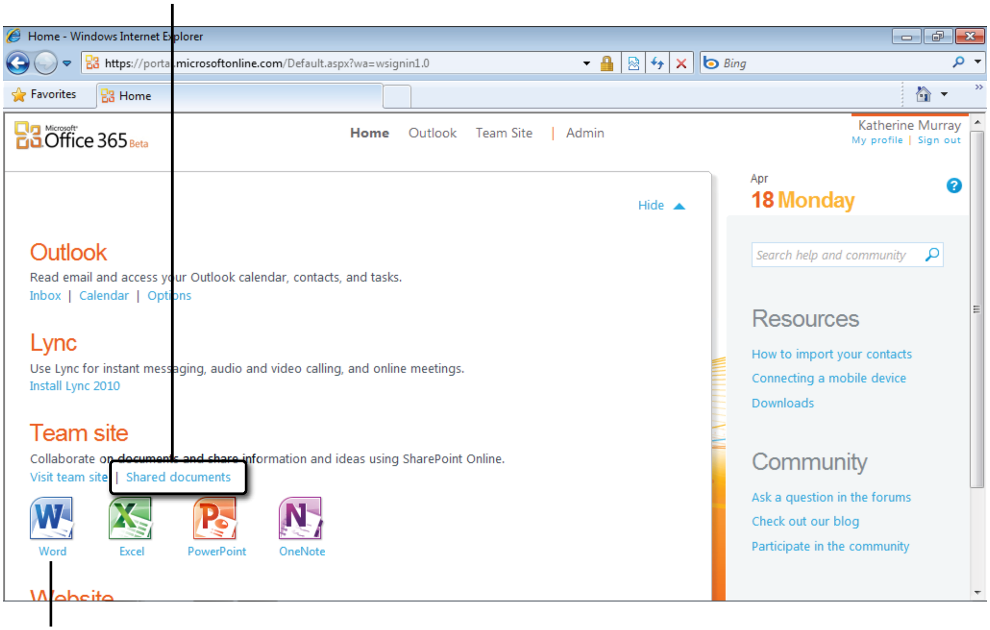
Along the way, Microsoft Office has been evolving to keep pace with the changing way we work. With the release of Office 2010, Microsoft introduced Office 2010 Web Apps, which includes versions of Word, Excel, PowerPoint, and OneNote that you can easily use from any point on the globe you have web access. This means you can create, edit, revise, and share files while you're on the go, using the same familiar software you use on your desktop system. And now Microsoft brings Office 2010 Web Apps into Office 365 so that you can create and work with files that you can easily share with your team. One other great perk of working with Office 2010 Web Apps is that you don't have any software to support or upgrade; that's all done behind the scenes so that you can keep focused on the tasks at hand. And if you don't have Internet Explorer, don't worry—Office Web Apps run on Firefox and Safari browsers. That means that whether you're logging in on a Mac, PC, or kiosk at a hotel or airport, you'll find the same reliable Office interface and be able to review, edit, and save the files that are important for your work.

This chapter walks you through using Office 2010 Web Apps in Office 365. As you'll see, creating, editing, and sharing files with your team is a simple process, and Web Apps include all the major tools you use in your favorite Office desktop applications.

A First Look at Office Web Apps

As soon as you log in to Office 365, Office Web Apps are within clicking distance. Just below the Team Site area, you'll see the four Web App icons: Word, Excel, PowerPoint, and OneNote. (See Figure 8-1.) To create a new file using Word, PowerPoint, or OneNote Web App, just click the icon of the program you want to use and type a name for it. The new file will be created in the Documents library of your team site. (Excel Web App works differently—you specify the file name when you turn on the Autosave feature.) If you want to access a file that has been created and shared in the Office 365 team site, click the Shared Documents link in the Team Site area of your Office 365 home page or click the Documents link of any team site.

Click to see documents that are already posted in Office 365.



Home - Windows Internet Explorer
https://portal.microsoftonline.com/Default.aspx?wa=wsignin1.0
Bing
Favorites
Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Hide
Apr
18 Monday
Search help and community

Outlook
Read email and access your Outlook calendar, contacts, and tasks.
Inbox | Calendar | Options

Lync
Use Lync for instant messaging, audio and video calling, and online meetings.
Install Lync 2010

Team site
Collaborate on documents and share information and ideas using SharePoint Online.
Visit team site | Shared documents

Word
Excel
PowerPoint
OneNote
Website
Resources
How to import your contacts
Connecting a mobile device
Downloads
Community
Ask a question in the forums
Check out our blog
Participate in the community

Click to start a new file in one of the Office Web Apps.

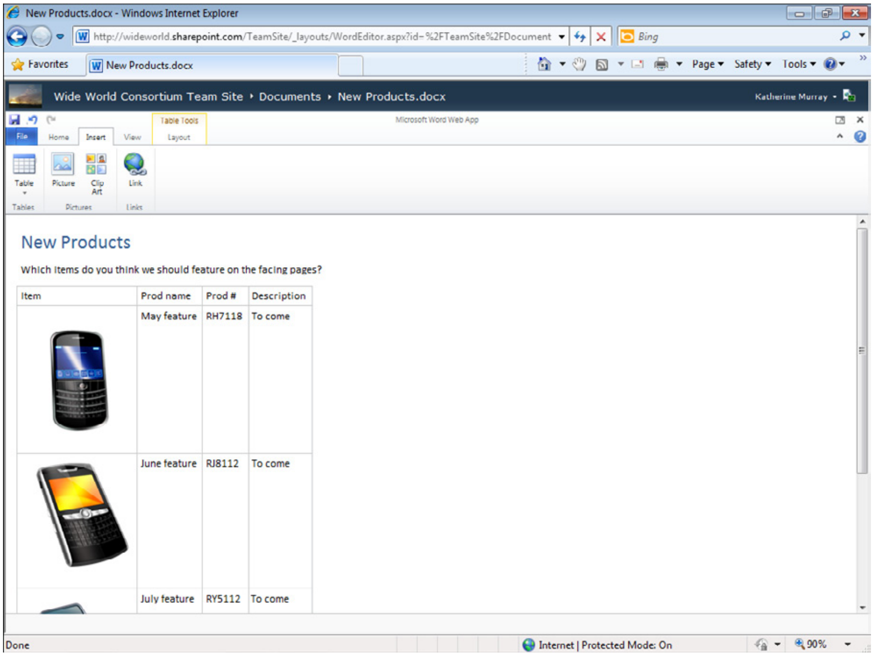
FIGURE 8-1 Open a new document using Office Web Apps from the Office 365 home page.

Introducing Office Web Apps

First introduced as companions to Office 2010 applications, Office Web Apps enable you to create, review, edit, and share files from any place you have access to the web.

Office Web Apps are designed to be a lighter offering than the more robust Office applications installed on your PC, but they provide you with the tools you need to keep your work flowing. Specifically, using Office Web Apps, you can

- Create new files in Word, Excel, PowerPoint, and OneNote.
- Review and format the content in your files.
- Add tables, illustrations, and Clip Art. (See Figure 8-2.)
- Clip and share notes easily.
- Collaborate with others as you edit and review files.
- Edit, update, and deliver presentations anywhere you have web access.


New Products.docx - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/WordEditor.aspx?id=%2FTeamSite%2FDocument
Bing
Favorites
New Products.docx
Page
Safety
Tools
Wide World Consortium Team Site ‣ Documents ‣ New Products.docx
Katherine Murray
Table Tools
Microsoft Word Web App
File
Home
Insert
View
Layout
Table
Picture
Clip Art
Link
Tables
Pictures
Links
Done
Internet | Protected Mode: On
90%

New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #	Description
	May feature	RH7118	To come
	June feature	RJ8112	To come
	July feature	RY5112	To come

FIGURE 8-2 You can add tables, pictures, clip art, and links to a document in Word Web App.

Using Office Web Apps, you can open, edit, and save files that are posted in your SharePoint document library or you can work with files from your own desktop or laptop

PC or Mac. Working with the file in the way that best fits your project is another way Office 365 provides just what you need when you need it.

VERSIONS OF OFFICE WEB APPS

If you were using Office 2010 prior to working with Office 365, you might know that Web Apps have been available for both personal and business users of Office 2010 for some time. For personal use, you can work with Office 2010 Web Apps when you use files in your Windows Live SkyDrive account. (Windows Live SkyDrive is a free utility available as part of Windows Live services that enables you to store and share files in a central location online.)

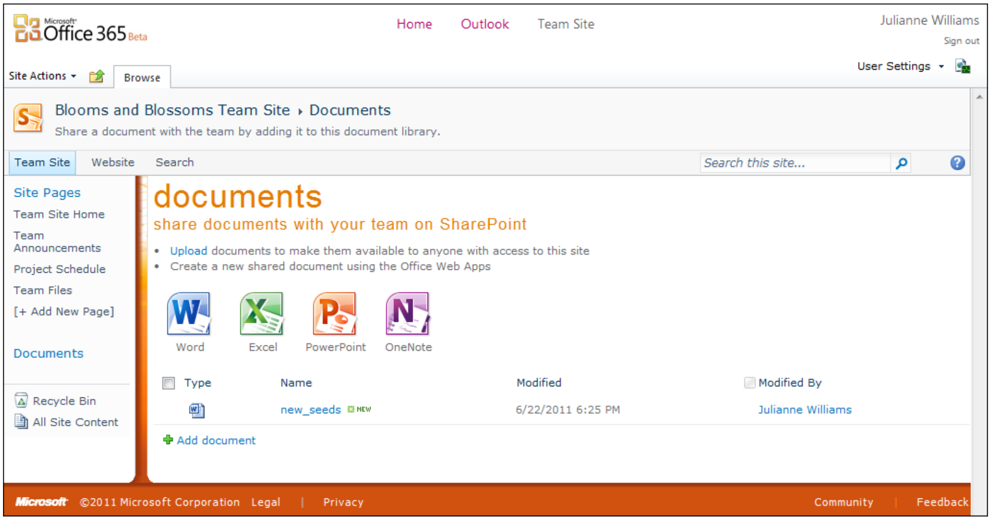
If your company uses Office 2010 Professional Plus, which includes SharePoint Workspace 2010, you can use Office Web Apps through your SharePoint access. In Office 365, Microsoft brought together the best of both worlds, giving businesses from small to enterprise-level, as well as individual team members, access to the familiar Office applications they use every day to finish business-critical tasks.

How Office Web Apps Work

As you learned in Chapter 3, “Administering an Office 365 Account,” one of the beautiful things about Office 365 is that there’s very little software for you to support. Instead of trying to figure out what an error message means or what you can do to correct it, Microsoft takes care of the technical back end of things by keeping your software up to date, offering a comprehensive help system, and giving you a number of options for getting answers to your questions.

Office Web Apps are based on this ease-of-use idea, giving you just what you need to view and edit your Office files by using your favorite web browser. You can start a new file for Word, Excel, PowerPoint, or OneNote directly from your Home page in Office 365, or you can click Documents in your SharePoint team site to begin a new file with one of the Office Web Apps. (See Figure 8-3.)

The file you create appears in your browser window, where you can use a number of tools to add content, format the information, insert elements like tables and pictures, and share the file with others. Although you can do simple edits in Web Apps, they’re designed to be a bit “lighter” than the full Office applications; so for in-depth editing, you can open the file in the application that is stored on your PC or Mac.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Julianne Williams
Sign out
Site Actions
Browse
User Settings
Team Site
Website
Search
Search this site...
Site Pages
Team Site Home
Team Announcements
Project Schedule
Team Files
[+ Add New Page]
Documents
Recycle Bin
All Site Content
Word
Excel
PowerPoint
OneNote
Add document
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback

Blooms and Blossoms Team Site › Documents

Share a document with the team by adding it to this document library.

documents

share documents with your team on SharePoint

- Upload documents to make them available to anyone with access to this site
- Create a new shared document using the Office Web Apps

Type	Name	Modified	Modified By
	new_seeds NEW	6/22/2011 6:25 PM	Julianne Williams

FIGURE 8-3 You can click Documents to display Office Web Apps when you're working in your SharePoint team site.

BETTER FLOW WITH SILVERLIGHT

Silverlight is a free web-browser plug-in available from Microsoft that improves video quality, streamlines performance, and allows for enhanced interactivity in the Internet applications you use. Silverlight is available as a plug-in on Internet Explorer, Firefox, Chrome, and Safari browsers and is also available for Windows Mobile phones.

You don't have to have the Silverlight plug-in installed to use Office Web Apps, but it does improve performance in the following ways:

- Word pages and PowerPoint presentations load faster.
- Text looks clearer when you magnify it.
- The Find On This Page feature works more accurately.
- In PowerPoint, animations are smoother and slides scale to the browser window size.

To find out more about Silverlight or install it on your computer, visit *www.microsoft.com/silverlight*.

Web Apps on Your Phone

Office 365 also works with your phone and enables you to get updates, review files, and make simple changes by accessing your SharePoint team site through your phone browser or Office Hub (only on Windows 7 phones). Office Web Apps in SharePoint are supported on Windows Mobile phones, as well as BlackBerry, iPhone, iPod Touch, Android, and Nokia S60 phones.

The screens that you view on your phone have been optimized for display on mobile devices, so finding your way around the team site is similar—but simpler—than the browser-based approach you're familiar with. For more information about working with Office 365 on your mobile phone, see Chapter 9, "Going Mobile with Office 365."

What You Can—and Can't—Do with Office 365

Knowing that users often need to access files on the go—perhaps to review a report with a client, check recent sales data in a worksheet, or update the spelling on a slide—Office Web Apps give you tools to review your files and make simple changes from any point you have web access.

Although the programs are robust enough to help you create, edit, and share simple files, they do not include many of the specific tools that are available to you in the Office programs you run on your computer. For example, high-end protection features, such as Information Rights Management (IRM), are not available in Office Web Apps. For increased security, Microsoft recommends you use the full version of the software available on your desktop or laptop computer.

Additionally, although you can view tracked changes in a document that has been posted to a SharePoint document library and opened in Word Web App, the web program doesn't include any functionality that will enable you to work with the tracked changes. To work with tracked changes, you need to use your desktop version of the software.

Here are some other differences you should be aware of:

- Format Painter isn't available in Office Web Apps.
- You can't add symbols or shapes or use the equation or date and time feature in Office Web Apps.
- Word Web App doesn't allow you to edit objects such as SmartArt.
- Translation features and the thesaurus are also not available.
- The Spelling Checker is available only in Word, PowerPoint, and OneNote.

- Macros are not enabled in any of the Office Web Apps.
- You can’t use inking or embed media files in a notebook in OneNote Web App.

Creating, Saving, and Closing a New File

You can create a new file easily by clicking the Office Web App icon of the file type you want to create. The new file opens in the browser window (shown in Figure 8-4, with Excel Web App displayed), and the ribbon offers the tools you need to get started.

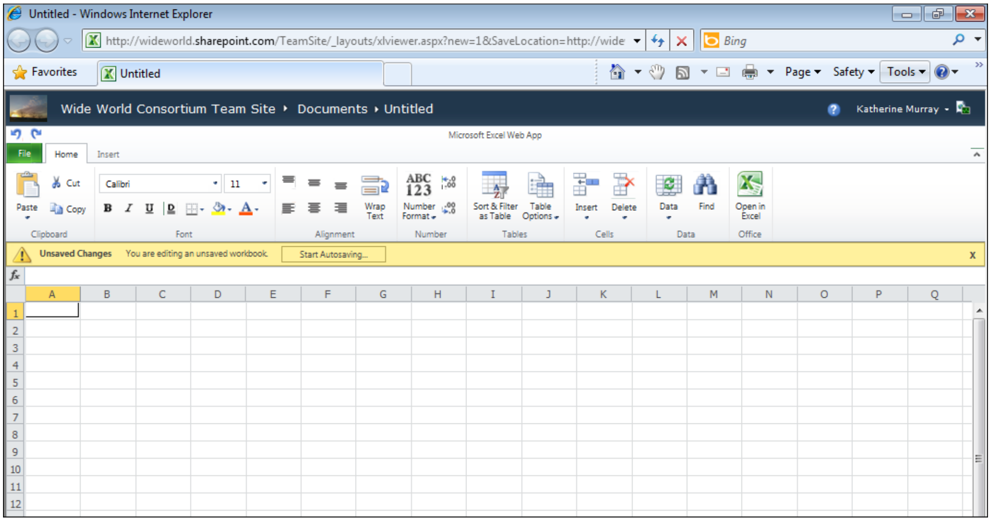

Untitled - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/xlviewer.aspx?new=1&SaveLocation=http://wide
Bing
Favorites
Untitled
Page
Safety
Tools
Wide World Consortium Team Site
Documents
Untitled
Katherine Murray
Microsoft Excel Web App
File
Home
Insert
Paste
Cut
Copy
Calibri
11
Wrap Text
Number Format
Sort & Filter as Table
Table Options
Insert
Delete
Data
Find
Open in Excel
Clipboard
Font
Alignment
Number
Tables
Cells
Data
Office
Unsaved Changes
You are editing an unsaved workbook.
Start Autosaving...
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q

FIGURE 8-4 After you click the Excel Web App icon, the new worksheet appears in your web browser.

Tip

You can now enter information by clicking in the cells and typing, copying, and pasting information, or creating tables for your workbook data.

When you’re finished working with an Excel workbook, a OneNote notebook, or a PowerPoint presentation using Office Web Apps, click the File tab and click Close when you’re ready to close the file. Because these Web Apps autosave your information, you don’t need to do anything to save your changes.

When you're finished adding content to a Word file, save and close the document by following these steps:

1. Click the File tab in the Web App.
2. Click Save.
3. Click File again, and click Close.

This saves the changes you made in the Word file and closes Word Web App. You are returned to your SharePoint document library, where you can create, view, or work with other files.

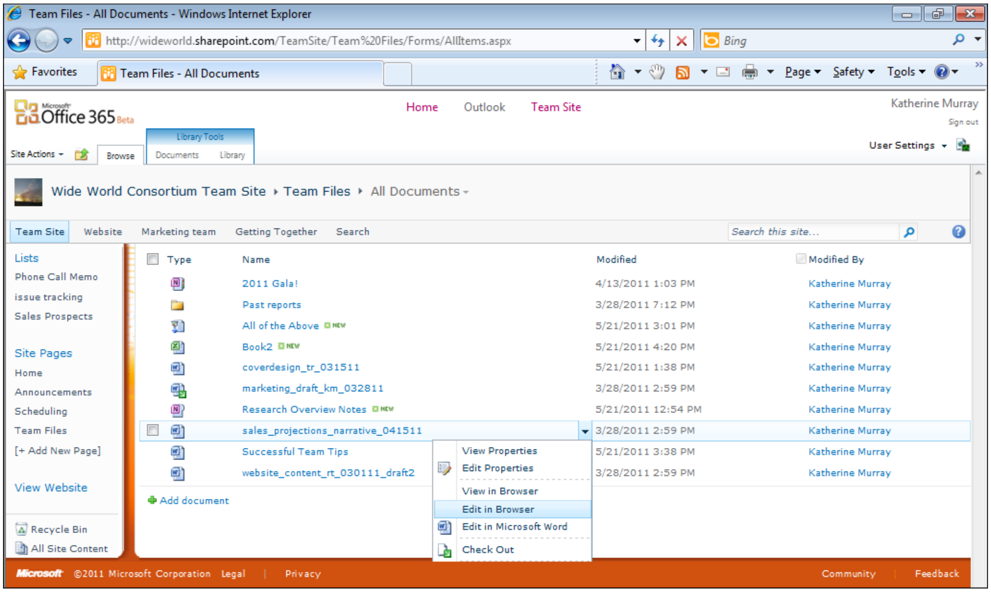
> Excel autosaves the changes you make to the worksheet, but interestingly enough, there is no way to close the worksheet beyond simply navigating away from the page. Excel Web App saves the worksheet for you, though, so clicking the Back arrow to return to your Home page or document library won't cause any loss of data.

Working with an Existing File

In Chapter 4, "What Your Team Can Do with Office 365," you learned how to create document libraries and post files so that your team members can get to them easily. When you want to work with a specific file—for example, perhaps you want to review the sales projections your manager just posted—you can choose whether you want to view or edit the file in the Office Web App. When you are working on a file, it is locked so that other users can't change the file while you're working on it. After you close the file, it is made available to your teammates for editing. Here are the steps:

1. Click Team Site at the top of your Office 365 Home page.
2. Display the document library where the files are stored.
3. Click the arrow to the right of the file name. (See Figure 8-5.)
4. Click one of the following:
   - View In Browser, if you simply want to review the file
   - Edit In Browser, if you want to be able to make changes in the file
   - Edit In Microsoft Word, if you want access to all editing tools in the full version of Word and you have Office 2010 installed on your computer.

   The file opens in your browser window, and you can edit or review the file as you'd like.


Team Files - All Documents - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/Team%20Files/Forms/AllItems.aspx
Bing
Favorites
Team Files - All Documents
Page
Safety
Tools
Microsoft Office 365 Beta
Home
Outlook
Team Site
Katherine Murray
Sign out
User Settings
Site Actions
Browse
Library Tools
Documents
Library
Wide World Consortium Team Site ▸ Team Files ▸ All Documents
Team Site
Website
Marketing team
Getting Together
Search
Search this site...
Lists
Phone Call Memo
issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Add document
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback

☐ Type	Name	Modified	Modified By
	2011 Gala!	4/13/2011 1:03 PM	Katherine Murray
	Past reports	3/28/2011 7:12 PM	Katherine Murray
	All of the Above NEW	5/21/2011 3:01 PM	Katherine Murray
	Book2 NEW	5/21/2011 4:20 PM	Katherine Murray
	coverdesign_tr_031511	5/21/2011 1:38 PM	Katherine Murray
	marketing_draft_km_032811	3/28/2011 2:59 PM	Katherine Murray
	Research Overview Notes NEW	5/21/2011 12:54 PM	Katherine Murray
☐	sales_projections_narrative_041511	3/28/2011 2:59 PM	Katherine Murray
	Successful Team Tips	5/21/2011 3:38 PM	Katherine Murray
	website_content_rt_030111_draft2	3/28/2011 2:59 PM	Katherine Murray

FIGURE 8-5 You can choose to view or edit files from your SharePoint document library.

Even though the example in Figure 8-5 shows Edit In Microsoft Word as one of the options available, Word is listed only because the selected file is a Word document. If you select an Excel worksheet file, the option displayed is Edit In Microsoft Excel.

FILE SIZE LIMITS: OFFICE 365 HAS TO DRAW THE LINE SOMEWHERE

Office 365 does set a limit on the size of your file uploads. No single file can be larger than 50 MB, which might not seem like much if you're used to creating large documents with lots of photos, tables, and illustrations or PowerPoint presentations with plenty of media—audio and video.

Administrators do have the power to increase the upload size, but doing so requires a little behind-the-scenes wrangling. So if you bump into the size issue repeatedly, let your friendly Office 365 tech support person help you increase the limit. Access Office 365 help by clicking Admin on the Office 365 Home page, clicking Overview in the Support area on the left side of the browser window, and clicking Get Help With Office Web Apps.

Choosing Your Tools

The familiar Office 2010 ribbon offers you specific sets of tools related to the task you're performing. If you've just added a picture to a document, for example, tools appear in tabs that are related to photo editing. Whether you're working online in Office 365 or editing a document on your local PC, the tools the Office 2010 application gives you are directly related to the tasks you're working on.

When you're working with an Office Web App, the same tool management approach enables you to have just what you need on the screen at any given point in time. You'll find fewer available tools in Office Web Apps, however, because if you want to do some heavy-duty editing, you can open the file in Microsoft Word, Excel, or PowerPoint; make any necessary changes; and save the file back to your Office 365 SharePoint library. Figure 8-6 gives you a sense of the tools available on the various tabs in Word Web App. As you can see, the tools allow you to add, edit, and format content, as well as switch between views.

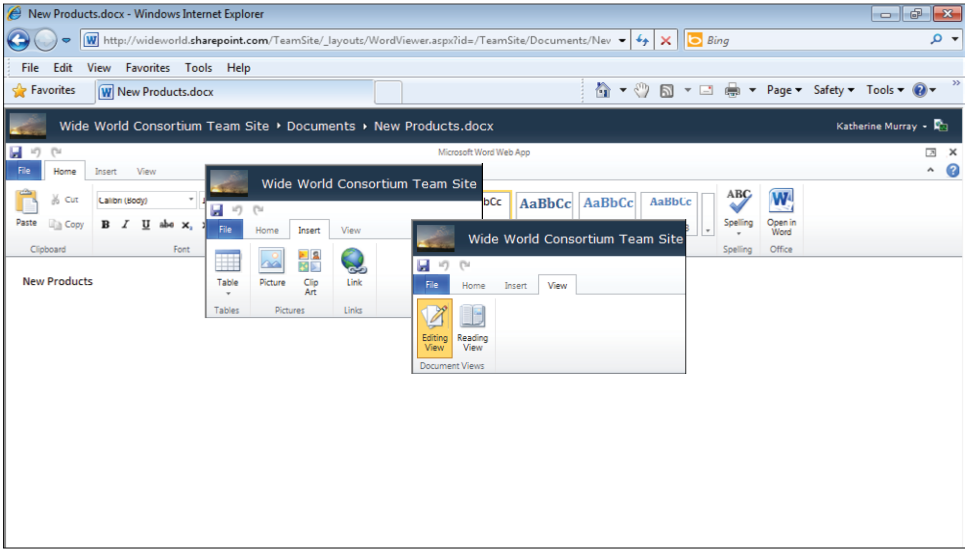

New Products.docx - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/WordViewer.aspx?id=/TeamSite/Documents/Nev
Bing
File Edit View Favorites Tools Help
Favorites
New Products.docx
Page Safety Tools
Wide World Consortium Team Site ▸ Documents ▸ New Products.docx
Katherine Murray
Microsoft Word Web App
File Home Insert View
Paste Cut Copy
Calibri (Body)
Clipboard Font
AaBbCc AaBbCc AaBbCc
Spelling Open in Word
Spelling Office
New Products
Wide World Consortium Team Site
File Home Insert View
Table Picture Clip Art Link
Tables Pictures Links
Wide World Consortium Team Site
File Home Insert View
Editing View Reading View
Document Views

FIGURE 8-6 Office Web App offers different sets of tools depending on which tab you click on.

Levels of Editing in Office Web Apps

As you can see, Office Web Apps are designed to be partners in crime to your favorite desktop Office applications. You won't be using them all the time, for everything, because there are a number of features you probably like and need that will be available only in your desktop applications. But Office Web Apps are perfect for those times when

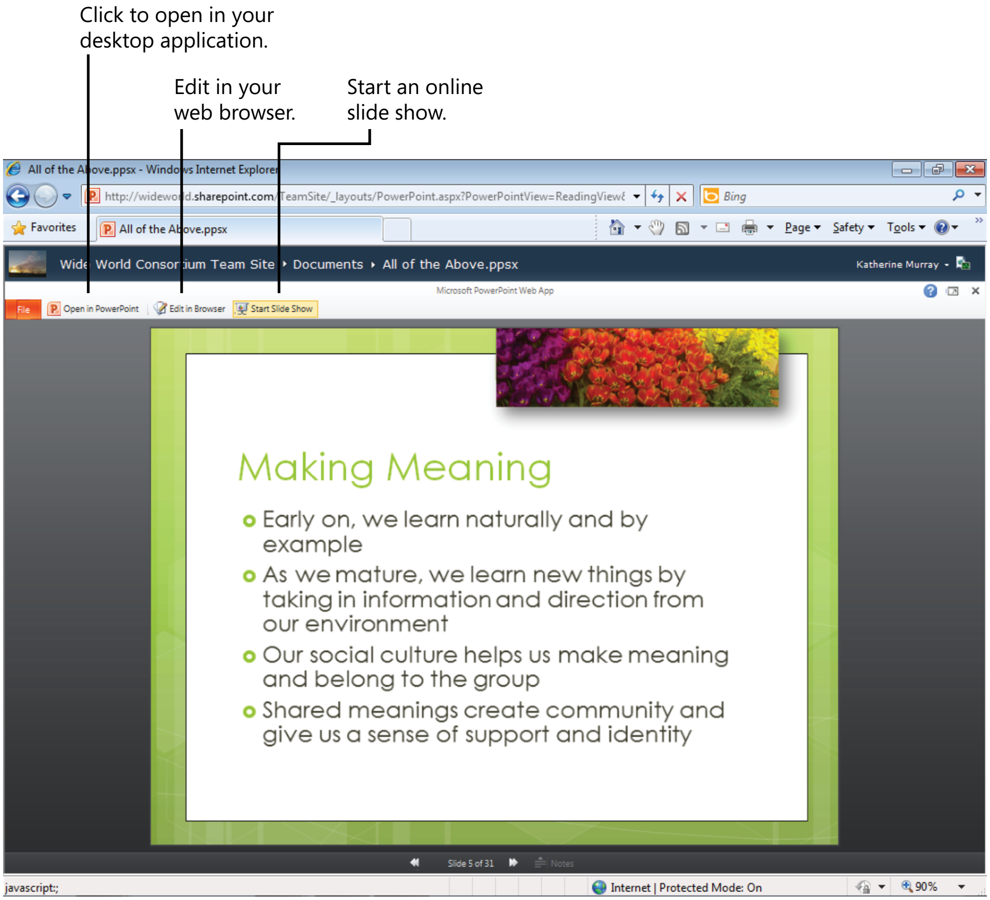
- You need a quick sign-off from a manager on new content you've added to a report.
- You want to share notes with a colleague about a new product you're developing.
- You need to get an update on sales reports or review a project budget before heading into a meeting.
- You want to share a product presentation with others to help them prepare for an upcoming sales call.

In other words, you use Office Web Apps when you need straightforward processing power and the flexibility of an "access anywhere, use anytime" tool.

But—never fear—if you begin doing a few light tasks with an Office Web App and then realize you really do need a bigger set of tools for some more in-depth work, you can easily move your file to your desktop application with a click of the mouse.

Viewing Your File in Office 365

For example, suppose that you open a PowerPoint presentation you want to review by clicking View In Browser in the SharePoint document library (as described in the previous section). The presentation appears in the web browser window, and you can press PgDn to move through the various slides. (See Figure 8-7.)



Click to open in your desktop application.

Edit in your web browser.

Start an online slide show.

All of the Above.ppsx - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/PowerPoint.aspx?PowerPointView=ReadingView&
Bing
Favorites
All of the Above.ppsx
Page
Safety
Tools
Wide World Consortium Team Site
Documents
All of the Above.ppsx
Katherine Murray
Microsoft PowerPoint Web App
File
Open in PowerPoint
Edit in Browser
Start Slide Show
Slide 5 of 31
Notes
javascript:;
Internet | Protected Mode: On
90%

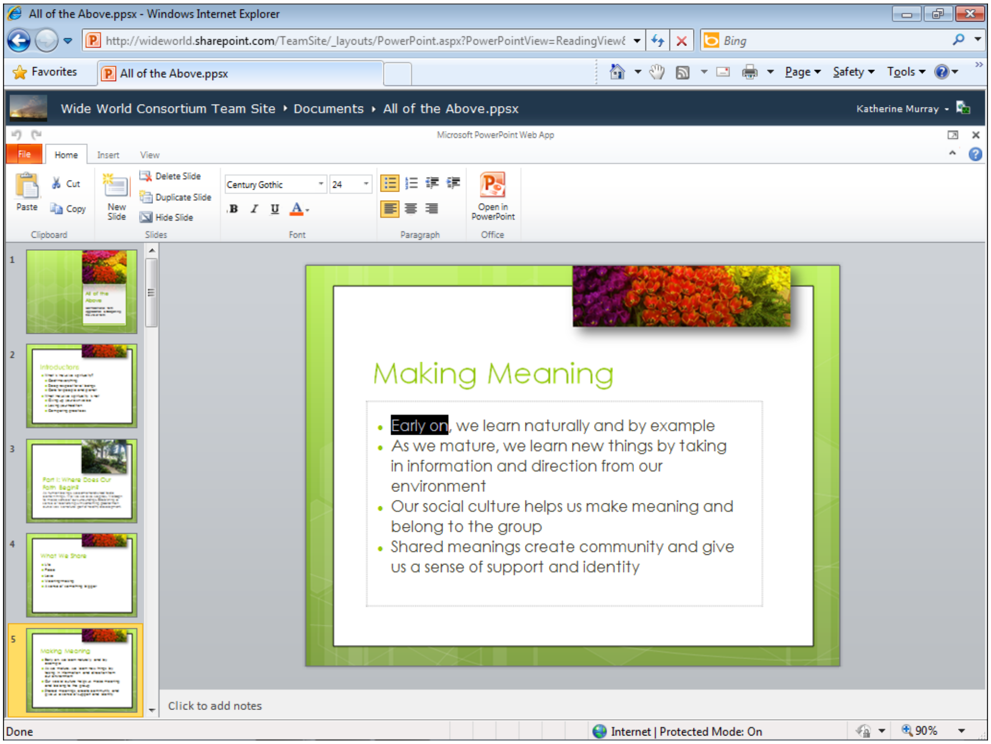
Making Meaning

- Early on, we learn naturally and by example
- As we mature, we learn new things by taking in information and direction from our environment
- Our social culture helps us make meaning and belong to the group
- Shared meanings create community and give us a sense of support and identity

FIGURE 8-7 When you're viewing a file in your web browser, you can click the tools at the top left to edit the file in your desktop application or in the browser window.

Editing in Your Web Browser

When you click Edit In Browser, the Office Web App changes to provide more tools in the ribbon and to enable you to select and work with objects—text, pictures, tables, and more—in the file. As you can see in Figure 8-8, you can revise and format the content in the file after you click Edit In Browser.


All of the Above.ppsx - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/PowerPoint.aspx?PowerPointView=ReadingView
Bing
Favorites
All of the Above.ppsx
Page
Safety
Tools
Wide World Consortium Team Site ▸ Documents ▸ All of the Above.ppsx
Katherine Murray
Microsoft PowerPoint Web App
File
Home
Insert
View
Paste
Cut
Copy
Clipboard
New Slide
Delete Slide
Duplicate Slide
Hide Slide
Slides
Century Gothic
24
Font
Paragraph
Open in PowerPoint
Office
Click to add notes
Done
Internet | Protected Mode: On
90%

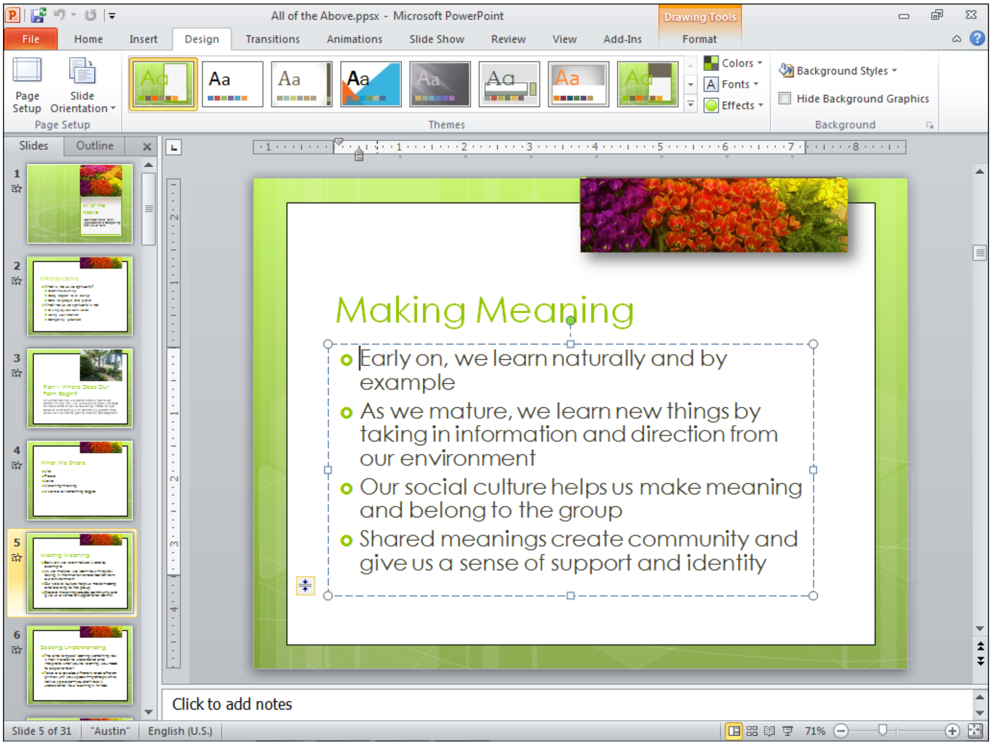
Making Meaning

- Early on, we learn naturally and by example
- As we mature, we learn new things by taking in information and direction from our environment
- Our social culture helps us make meaning and belong to the group
- Shared meanings create community and give us a sense of support and identity

FIGURE 8-8 When you click Edit In Browser, the ribbon displays additional tools and you can select content on the slide.

Taking It to the Desktop

If you decide that the work you want to do is a little more involved than the tools in the Office Web App can handle, you can easily click the option to open the file in your full desktop application. When you click Open in PowerPoint, for example, Office 365 may prompt you to enter your Office 365 user ID and password, and then the file opens in the full PowerPoint program that is installed on your computer. (See Figure 8-9.)


All of the Above.ppsx - Microsoft PowerPoint
Drawing Tools
File
Home
Insert
Design
Transitions
Animations
Slide Show
Review
View
Add-Ins
Format
Page Setup
Slide Orientation
Page Setup
Themes
Colors
Fonts
Effects
Background Styles
Hide Background Graphics
Background
Slides
Outline
Slide 5 of 31
"Austin"
English (U.S.)
71%

Making Meaning

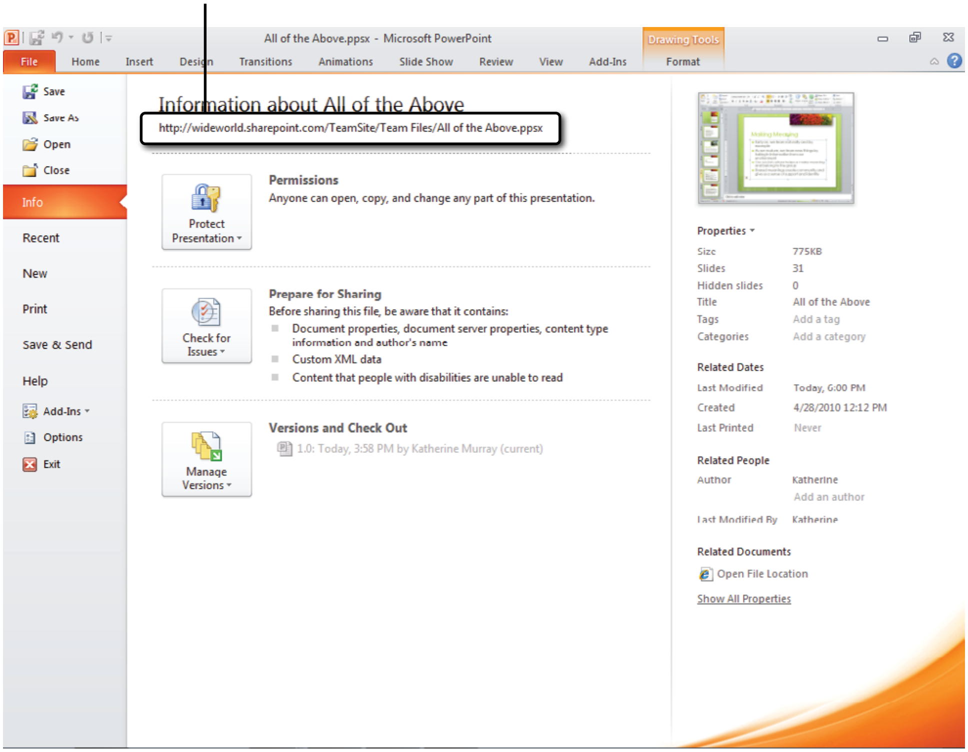
- Early on, we learn naturally and by example
- As we mature, we learn new things by taking in information and direction from our environment
- Our social culture helps us make meaning and belong to the group
- Shared meanings create community and give us a sense of support and identity

Click to add notes

FIGURE 8-9 When you open the file in PowerPoint, the full range of application tools is available to you.

After you make the changes you need in the file, you can save it back to the SharePoint team site by clicking on the File tab and clicking Save. You can see from the file path at the top of the Info tab that the file will be saved back to your team site. (See Figure 8-10.)

Now that you know the basics of opening, viewing, and editing files in Office Web Apps, the rest of this chapter takes a look at some specific tasks you might want to try in Office 365.



File location shows the file will be saved to the team site online.

All of the Above.ppsx - Microsoft PowerPoint
Drawing Tools
File
Home
Insert
Design
Transitions
Animations
Slide Show
Review
View
Add-Ins
Format
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Add-Ins
Options
Exit
Protect Presentation
Check for Issues
Manage Versions

Information about All of the Above

http://wideworld.sharepoint.com/TeamSite/Team Files/All of the Above.ppsx

Permissions
Anyone can open, copy, and change any part of this presentation.

Prepare for Sharing
Before sharing this file, be aware that it contains:

- Document properties, document server properties, content type information and author's name
- Custom XML data
- Content that people with disabilities are unable to read

Versions and Check Out
1.0: Today, 3:58 PM by Katherine Murray (current)

Properties

Size	775KB
Slides	31
Hidden slides	0
Title	All of the Above
Tags	Add a tag
Categories	Add a category

Related Dates

Last Modified	Today, 6:00 PM
Created	4/28/2010 12:12 PM
Last Printed	Never

Related People

Author	Katherine Add an author
Last Modified By	Katherine

Related Documents

Open File Location

Show All Properties

FIGURE 8-10 Save the file back to the team site by clicking on the File tab and clicking Save.

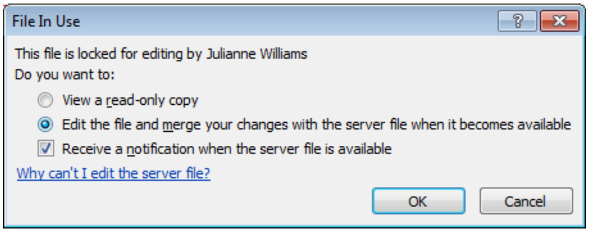
Co-authoring with Office Web Apps

One of the challenges of working remotely—especially if your team is scattered all over the country, or the globe—is that collaboration can be difficult. Think about it. If you're in the office and you need to make a team decision about a new design for the spring catalog, you can all gather in the conference room, spread the designs out on the table, and talk about your likes and dislikes.

In a cloud environment, weighing in as a group on a specific project takes a little more planning, but now, thanks to Office 365, it can be done more easily. Using the co-authoring features available in Office Web Apps, you can work alongside team members in the same file, working on complementary sections and chatting in real time—via Lync Online and instant messaging—while you're doing it.

Editing in the Browser

The way Web Apps behave when you're using them to co-author files varies slightly depending on which program you're using. For example, when two of you are editing a document in Word Web App or a presentation in PowerPoint, one person can edit the document in the Web App, but the second person must click Open in Word. and the second user will see a dialog box with several options, including one to save and sync the edits with the server when the first used is no longer using the file. (See Figure 8-11.)



This file is locked for editing by Julianne Williams

Do you want to:

○ View a read-only copy

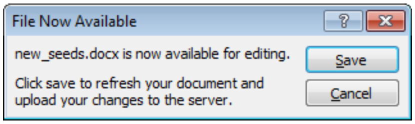
● Edit the file and merge your changes with the server file when it becomes available

☑ Receive a notification when the server file is available

Why can't I edit the server file?

FIGURE 8-11 When you are the second author opening a file in Word Web App or PowerPoint Web App, you are given a choice of viewing the file only or making changes and saving them to the server later.

After the first user closes the document, Word lets you know you can save your changes to the server as well by clicking Save. (See Figure 8-12.)

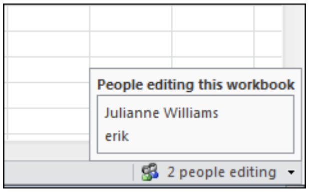


new_seeds.docx is now available for editing.

Click save to refresh your document and upload your changes to the server.

FIGURE 8-12 Word or PowerPoint lets you know when the first co-author has closed the file so that your changes can be synced with the server.

Excel Web App behaves differently, enabling two co-authors to be working in the same file in their browser windows. To edit a worksheet using Excel Web App, you can open the file and click Edit In Browser, whether you're the first author or an additional co-author. Excel displays the number of authors working on the file in the lower right corner of the worksheet window. You can click the notification to see who else is working on the file with you. (See Figure 8-13.)



Julianne Williams

erik

2 people editing

FIGURE 8-13 You can click the co-author symbol in the lower right corner of Excel Web App to see who else is working in the file.

OneNote is a different animal altogether, making co-authoring a simpler process. Co-authors can simply open the OneNote notebook in Outlook Web App, make changes, add content, and take notes to their hearts' content, and OneNote syncs the information seamlessly so that other authors' additions appear as you go.

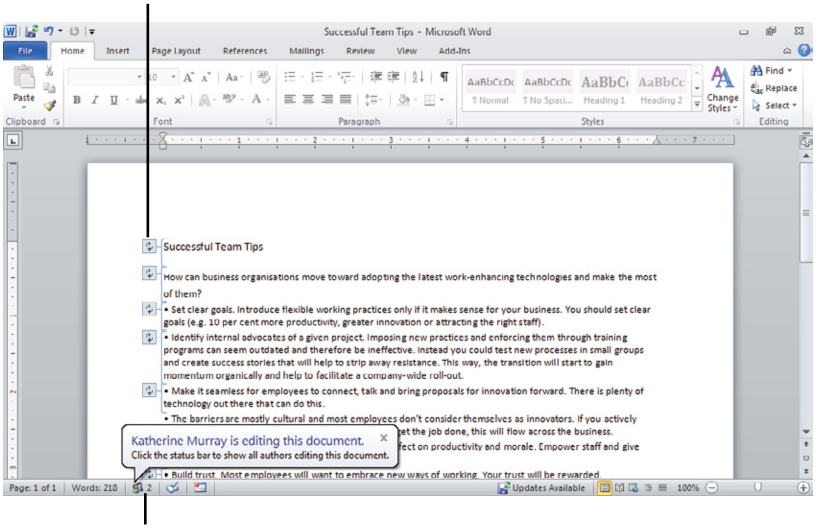
Another Way to Co-author in Office 365

You can also co-author documents using Office 2010 applications by editing them in your own version of the software on your desktop or laptop computer. The connection is maintained with the server, and you can see who else is working in the file and collaborate effectively. Here's how to open one of your Office 365 documents so that you can co-author a file working in the Web Apps on your own computer:

1. In the Office 365 Home page, click Team Site.
2. Display your SharePoint document library.
3. Click the arrow to the right of the file name you want to edit.
4. Click Edit in Microsoft Word.
5. The document opens in Word. Edit the file as usual.

Word lets you know when other authors are working in the file, and it marks the changes made by another author when you click on the File tab and either choose Save or press Ctrl+S to save the file. (See Figure 8-14.)

Updates are available.


Successful Team Tips - Microsoft Word
File
Home
Insert
Page Layout
References
Mailings
Review
View
Add-Ins
Paste
Clipboard
Font
Paragraph
AaBbCcDc
¶ Normal
AaBbCcDc
¶ No Spaci...
AaBbC
Heading 1
AaBbCc
Heading 2
Styles
Change Styles
Find
Replace
Select
Editing
Page: 1 of 1
Words: 218
2
Updates Available
100%

Successful Team Tips

How can business organisations move toward adopting the latest work-enhancing technologies and make the most of them?

• Set clear goals. Introduce flexible working practices only if it makes sense for your business. You should set clear goals (e.g. 10 per cent more productivity, greater innovation or attracting the right staff).

• Identify internal advocates of a given project. Imposing new practices and enforcing them through training programs can seem outdated and therefore be ineffective. Instead you could test new processes in small groups and create success stories that will help to strip away resistance. This way, the transition will start to gain momentum organically and help to facilitate a company-wide roll-out.

• Make it seamless for employees to connect, talk and bring proposals for innovation forward. There is plenty of technology out there that can do this.

• The barriers are mostly cultural and most employees don't consider themselves as innovators. If you actively

get the job done, this will flow across the business.

fect on productivity and morale. Empower staff and give

• Build trust. Most employees will want to embrace new ways of working. Your trust will be rewarded.

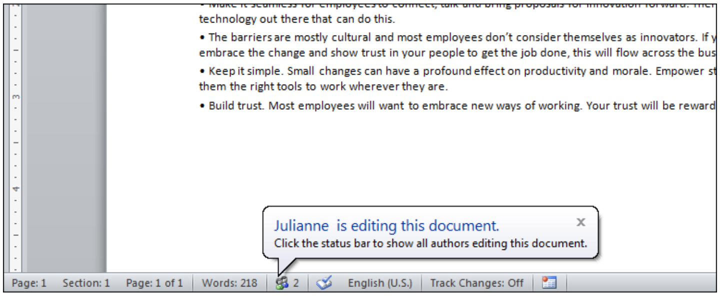
Katherine Murray is editing this document.

Click the status bar to show all authors editing this document.

Click to display current author list.

FIGURE 8-14 Word lets you know where the file has been updated and provides a list of current authors.

When new authors open the file while you're working on it, Word displays a pop-up message and shows you the number of authors working in the current file. (See Figure 8-15.)



technology out there that can do this.

- The barriers are mostly cultural and most employees don't consider themselves as innovators. If y embrace the change and show trust in your people to get the job done, this will flow across the bus
- Keep it simple. Small changes can have a profound effect on productivity and morale. Empower st them the right tools to work wherever they are.
- Build trust. Most employees will want to embrace new ways of working. Your trust will be reward

Julianne is editing this document.

Click the status bar to show all authors editing this document.

FIGURE 8-15 Office 365 lets you know when another author logs in to co-author the current file.

When you finish making changes in the document, simply click File and choose Close. If any changes have not been saved, you'll be prompted to save the file. You can return to the SharePoint document library and view the file and see that all changes are reflected in the file.

Reviewing and Editing Excel Worksheets

Similar to the process of opening, viewing, and editing other files in your SharePoint document library, you can open an Excel worksheet in Excel Web App. Click the arrow in the SharePoint document library to view or edit the file in your browser.

Although the features in Excel Web App are limited, you can add data, create formulas, use functions, and sort, filter, and recalculate the data in the workbook. You'll find everything you need for entering, formatting, and adjusting rows and columns on the Home tab.

At this time, Excel Web App in Office 365 does not support the use of charts, although you can add charts to the version of Excel Web App that is available through Windows Live SkyDrive.

In addition to using the workbooks and data tables you create, you can work with PivotTables you previously created using your desktop version of Excel 2010.

You can download a snapshot of the data and formulas in your worksheet by clicking on the File tab and clicking Download A Snapshot, as you see in Figure 8-16. This view gives you a sense of the contents of your workbook without applying the formatting to the file.

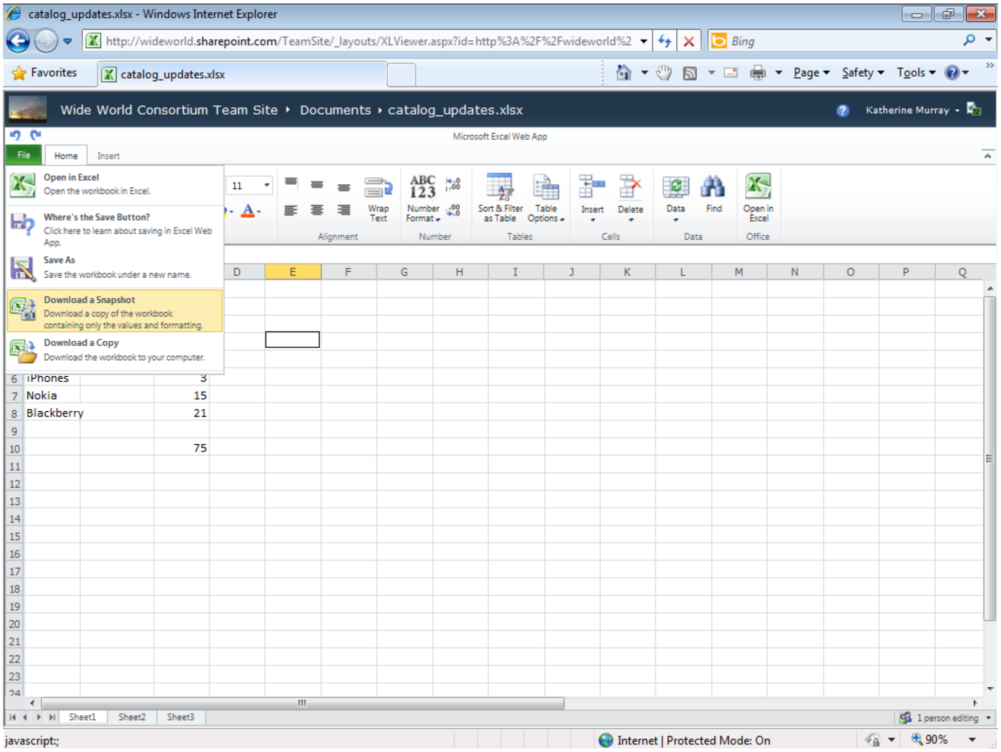
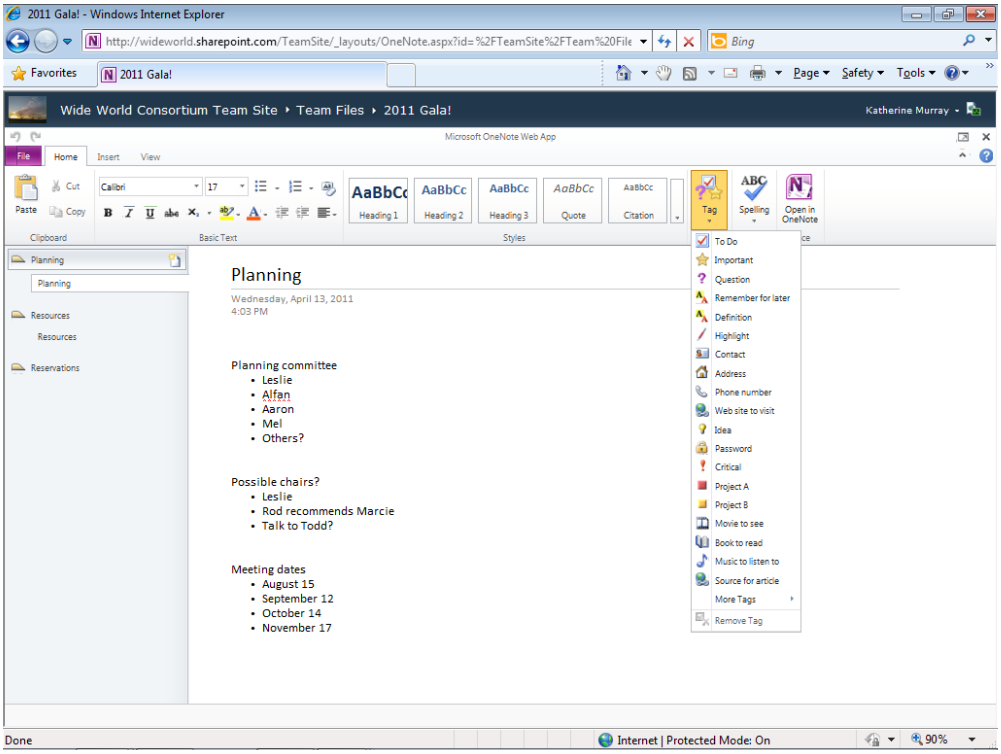

catalog_updates.xlsx - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/XLViewer.aspx?id=http%3A%2F%2Fwideworld%2
Bing
Favorites
catalog_updates.xlsx
Page
Safety
Tools
Wide World Consortium Team Site
Documents
catalog_updates.xlsx
Katherine Murray
Microsoft Excel Web App
File
Home
Insert
Open in Excel
Open the workbook in Excel.
Where's the Save Button?
Click here to learn about saving in Excel Web App.
Save As
Save the workbook under a new name.
Download a Snapshot
Download a copy of the workbook containing only the values and formatting.
Download a Copy
Download the workbook to your computer.
Wrap Text
Number Format
Sort & Filter as Table
Table Options
Insert
Delete
Data
Find
Open in Excel
Alignment
Number
Tables
Cells
Data
Office
iPhones 3
Nokia 15
Blackberry 21
75
Sheet1
Sheet2
Sheet3
1 person editing
javascript:;
Internet | Protected Mode: On
90%

FIGURE 8-16 After creating and editing Excel data, you can download a snapshot of the information you've entered.

Working with OneNote Notebooks

When you create a OneNote notebook in OneNote Web App, the program creates a shared notebook by default, meaning those with the necessary permissions (which the site Admin sets in the User settings) are able to view, edit, and save notes in the shared notebook. The notebook opens in your browser window with sections and pages listed in the navigation pane on the left. You can type in the page area and format the text as you'd like. You can also click Tag and choose the tag that will help you locate the content later. (See Figure 8-17.)


2011 Gala! - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/OneNote.aspx?id=%2FTeamSite%2FTeam%20File
Bing
Favorites
2011 Gala!
Page
Safety
Tools
Wide World Consortium Team Site ‣ Team Files ‣ 2011 Gala!
Katherine Murray
Microsoft OneNote Web App
File
Home
Insert
View
Paste
Cut
Copy
Calibri
17
Clipboard
Basic Text
Heading 1
Heading 2
Heading 3
Quote
Citation
Styles
Tag
Spelling
Open in OneNote
Planning
Planning
Resources
Resources
Reservations
To Do
Important
Question
Remember for later
Definition
Highlight
Contact
Address
Phone number
Web site to visit
Idea
Password
Critical
Project A
Project B
Movie to see
Book to read
Music to listen to
Source for article
More Tags
Remove Tag
Done
Internet | Protected Mode: On
90%

Planning

Wednesday, April 13, 2011
4:03 PM

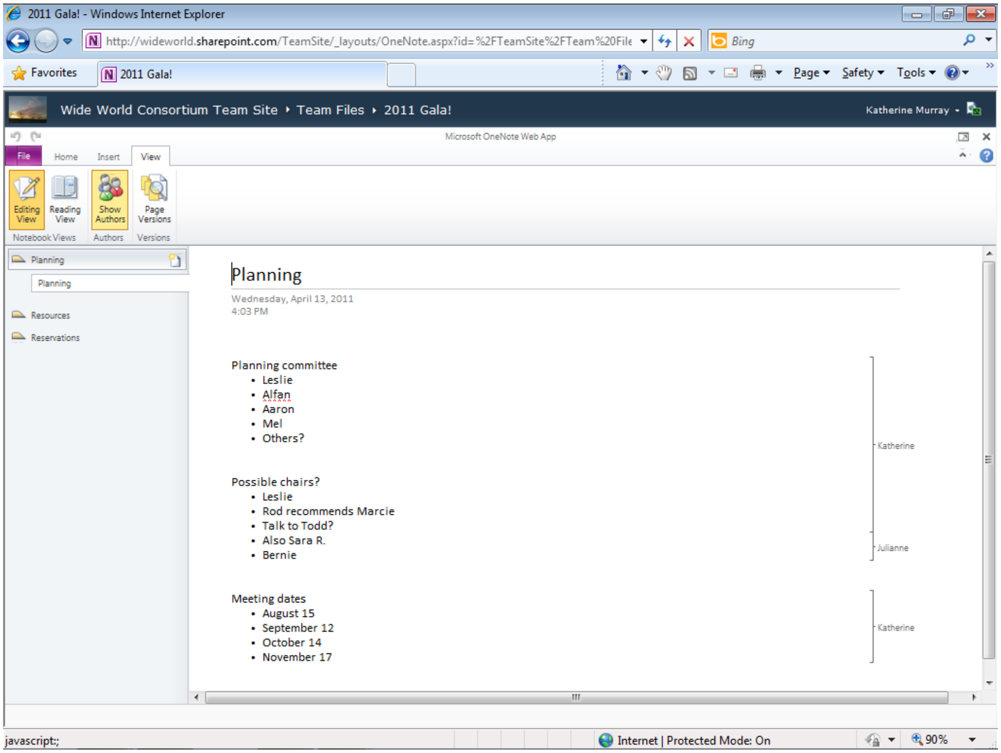
Planning committee
- Leslie
- Alfan
- Aaron
- Mel
- Others?

Possible chairs?
- Leslie
- Rod recommends Marcie
- Talk to Todd?

Meeting dates
- August 15
- September 12
- October 14
- November 17

FIGURE 8-17 You can easily add, format, and tag the notes you save in OneNote Web App.

The tools on the Insert tab give you the option of adding new pages and sections, inserting tables, incorporating pictures and clip art, or adding links to your notes pages. On the View tab, you can choose between Editing View and Reading View, review information about various page versions, and click Show Authors to see which authors added the various notes on the page. (See Figure 8-18.)


2011 Gala! - Windows Internet Explorer
http://wideworld.sharepoint.com/TeamSite/_layouts/OneNote.aspx?id=%2FTeamSite%2FTeam%20File
Bing
Favorites
2011 Gala!
Page
Safety
Tools
Wide World Consortium Team Site
Team Files
2011 Gala!
Katherine Murray
Microsoft OneNote Web App
File
Home
Insert
View
Editing View
Reading View
Show Authors
Page Versions
Notebook Views
Authors
Versions
Planning
Planning
Resources
Reservations
Katherine
Julianne
Katherine
javascript:;
Internet | Protected Mode: On
90%

Planning

Wednesday, April 13, 2011
4:03 PM

Planning committee
- Leslie
- Alfan
- Aaron
- Mel
- Others?

Possible chairs?
- Leslie
- Rod recommends Marcie
- Talk to Todd?
- Also Sara R.
- Bernie

Meeting dates
- August 15
- September 12
- October 14
- November 17

FIGURE 8-18 Click Show Authors to display the names of contributing authors along the right side of the notes page.

PROTECTING ONENOTE NOTEBOOK SECTIONS

If you like the idea of sharing your notebook with the team but you'd like to keep a section or two password protected for your eyes only, you can do so. Open the OneNote notebook in OneNote 2010 on your computer (by clicking Open in OneNote on the far right side of the Home tab), and then right-click the section tab of the section you want to password protect. Choose Password Protect This Section, and click Set Password. Type a password and confirm the password you entered; then click OK. When you exit the notebook, it is synced back with your Office 365 shared documents.

Now when you or one of your team members opens the notebook in OneNote Web App, the rest of the shared notebook will be available. However, when someone clicks the password-protected section, that person will not be able to open the section. If the user clicks Open In OneNote, a message appears informing the user that the section is password protected. The user is then prompted to press Enter and type the section password. The user can enter the password—if she knows it—and click OK to edit the section, or she can click Cancel and close the notebook.

What's Next

In this chapter, you explored Office Web Apps and discovered how to create and work with files from Word, PowerPoint, Excel, and OneNote, both in the Office Web App versions and in your desktop applications. The next chapter shows you how you can use your mobile device to work with files and stay in touch with your team in Office 365.

CHAPTER 9

Going Mobile with Office 365

IN THIS CHAPTER:

- How will you use your phone with Office 365?
- Receiving and sending email on your phone
- Using the Office Hub on your Windows Phone 7
- Last-minute Word editing on your mobile device
- Reviewing and updating Excel data
- Tweaking a PowerPoint presentation on your phone
- What's next

LET'S FACE IT. Who wants to sit indoors, stuck at a desk on a beautiful spring day? And wouldn't it be nice to make the most of the 30 minutes you spend sitting in the doctor's office by getting some work done on your phone? Office 365 makes accessing and working with your files easy and seamless, thanks to its flexible, connect-anywhere design. If you're not quite finished reviewing a file and it's time to hit the road, you can access the document and finish it later using your mobile phone.

You can use Office 365 with your smartphone to view, edit, and share the Word, Excel, PowerPoint, and OneNote files you have posted in your SharePoint team site. This chapter introduces you to the various ways you can use mobile devices to access your Office 365 files. You'll see the oh-so-beautiful Windows Phone 7 used to demonstrate some examples in this chapter, but Office 365 works with a variety of phones, including BlackBerry, Android, iTouch, and Nokia smartphones.

MANGO: IT'S NOT JUST FOR BREAKFAST ANYMORE

As this book was being written, Microsoft released a bit of information about the next Windows Phone operating system, codenamed Mango. This new release will add features that make sharing files easier and more seamless when you're interacting with Office 365. Mango also supports Lync functionality so that you can take your instant messaging and presence on the road with you while staying in sync with Office 365.

How Will You Use Your Phone with Office 365?

One of the major design objectives for Office 365 was that it be easy to access and easy to use on all sorts of devices—PCs, netbooks, laptops, tablets, and mobile devices. The idea is to ensure that wherever you are you can access your team site and work with your files, using whatever device gives you the web access you need.

Smartphones today are increasingly able to browse the web in a convenient, quick manner. Even the best phones a few years ago had long wait times while graphics downloaded and rarely offered interfaces that were custom designed for the mobile phone. Today, developers design specifically for the small screen of the mobile device, and they optimize the navigation and site functionality to make finding what you need as easy as possible.

On Windows 7 phones, users can access their Office 365 account directly from the Office Hub, a feature that brings together the mobile versions of Word, Excel, PowerPoint, and OneNote. This means you won't have to use your web browser to access your Office 365 account—instead, you can connect directly to SharePoint and use these Office applications to view and work with your Office files with a few simple taps.

Office 365 optimizes the screen for mobile devices, which means you can find, open, and work with the files you need easily on your mobile phone. Using your phone, you can

- Check email, contacts, and calendar items.
- Access your team site to review announcements and posts.
- View and edit Word documents stored in your SharePoint team site.
- View and work with Excel worksheets available in your document libraries.
- Review and work with PowerPoint presentations.
- Update, edit, and share OneNote notebooks.

No matter what kind of work you want to get done while you're on the road, you can easily open, view, edit, and share your Office 365 files and stay in touch with your team along the way.

Receiving and Sending Email on Your Phone

In Chapter 2, "Getting Started with Office 365," you learned how to set up your Office 365 email so that you can view it and respond to it on your mobile phone. The process varies depending on the type of phone you have. After you've set up the phone to work with Office 365, you can view your email simply by tapping the email icon on your Start screen.

If you've set up your Office 365 mail as your primary mail account, the Outlook icon on your Windows Phone 7 start screen shows the number of emails waiting for you to review, as shown in Figure 9-1. (If you've set up a different email account as your primary account, that account will appear by default in the Outlook icon, providing of course it is an Outlook-based account.)

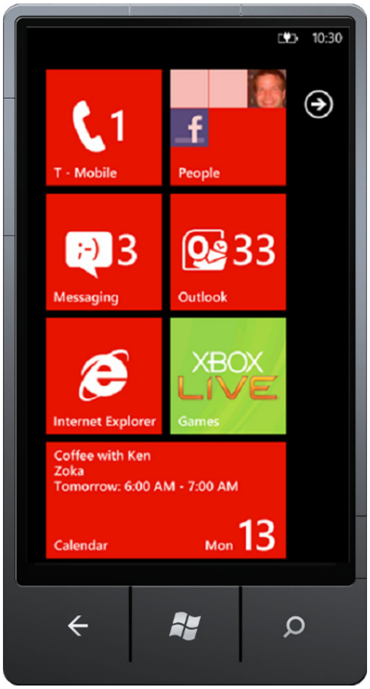
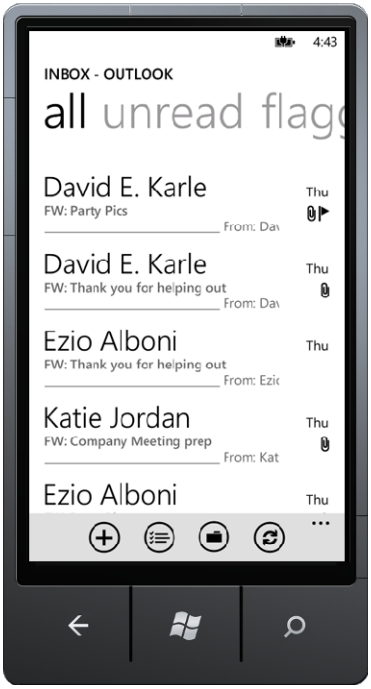

10:30
1
T - Mobile
People
3
Messaging
33
Outlook
Internet Explorer
XBOX LIVE
Games
Coffee with Ken
Zoka
Tomorrow: 6:00 AM - 7:00 AM
Calendar
Mon 13

FIGURE 9-1 Your Windows Phone 7 shows you the number of emails awaiting your attention.

To read your email, tap the Outlook icon. The messages appear in a list on your phone. (See Figure 9-2.)



4:43

INBOX - OUTLOOK

all unread flag

David E. Karle Thu
FW: Party Pics
From: Dav

David E. Karle Thu
FW: Thank you for helping out
From: Dav

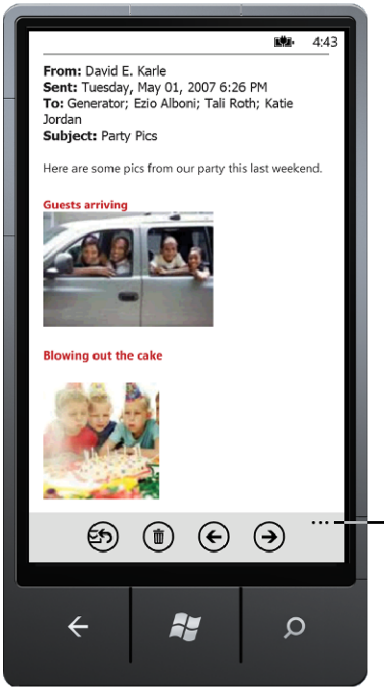
Ezio Alboni Thu
FW: Thank you for helping out
From: Ezic

Katie Jordan Thu
FW: Company Meeting prep
From: Kat

Ezio Alboni Thu

FIGURE 9-2 Tap the Outlook icon to review the list of available messages.

Next, tap the message you want to see, and it opens on your screen, pictures and all. (See Figure 9-3.)



From: David E. Karle
Sent: Tuesday, May 01, 2007 6:26 PM
To: Generator; Ezio Alboni; Tali Roth; Katie Jordan
Subject: Party Pics

Here are some pics from our party this last weekend.

Guests arriving

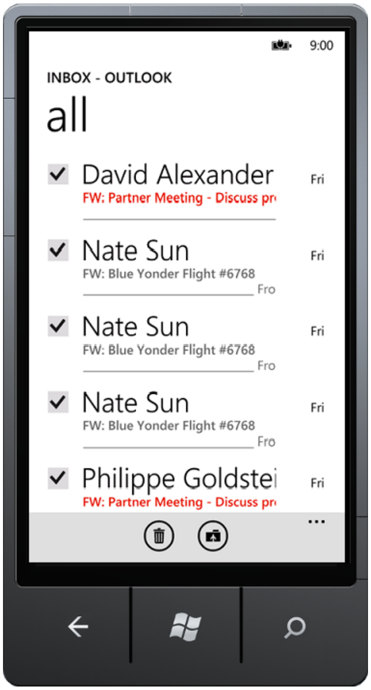
Blowing out the cake

Click to display email options.

FIGURE 9-3 The email message opens in your phone display.

You can tap the three dots in the lower right corner of the phone display to see email options that enable you to reply to or forward the message. To respond to the message, tap Reply and type the message you want to send on the keyboard that appears in the phone window. Then tap the Send button to send the message.

When you're ready to delete email messages you no longer need, tap the area of the screen to the left of the message in the Inbox screen. A check mark appears to the left of the message. You can scroll through the list and tap to add check marks to all the messages you want to delete. Tap Delete at the bottom of the Inbox window to remove the messages. (See Figure 9-4.) If you'd rather file the messages for safekeeping, you can tap Folder and choose the folder in which you'd like to save the selected messages.



9:00

INBOX - OUTLOOK

all

☑ David Alexander Fri
FW: Partner Meeting - Discuss pr

☑ Nate Sun Fri
FW: Blue Yonder Flight #6768
Fro

☑ Nate Sun Fri
FW: Blue Yonder Flight #6768
Fro

☑ Nate Sun Fri
FW: Blue Yonder Flight #6768
Fro

☑ Philippe Goldstei Fri
FW: Partner Meeting - Discuss pr

FIGURE 9-4 Tap to select the messages you want to remove, and then tap Delete.

Tip

Tip

Using the Office Hub on Your Windows Phone 7

The Office Hub is a built-in feature on the Windows 7 phone, enabling you to access your Office files and SharePoint sites easily from one starting point. You might find the Office Hub tile on your Windows Phone Start page or on the Apps list. If you don't see the Office Hub tile on the Start page, flick left or tap the arrow to display the Apps list. (See Figure 9-5.) Tap Office to display the Office Hub.

Tip

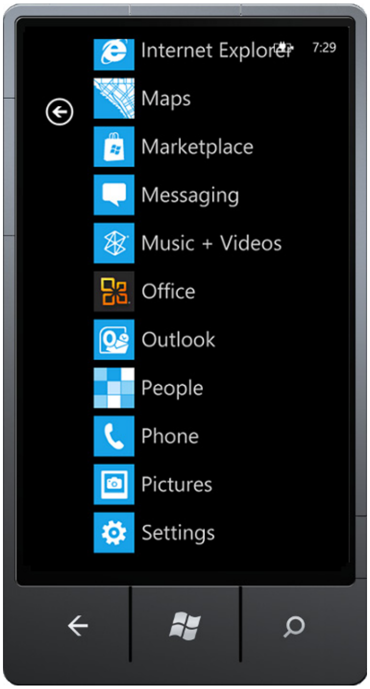

7:29
Internet Explorer
Maps
Marketplace
Messaging
Music + Videos
Office
Outlook
People
Phone
Pictures
Settings

FIGURE 9-5 If you don't see the Office Hub on your Windows Phone 7 Start screen, flick the screen to the left.

When you tap the Office Hub, an overview page appears, offering you a number of ways to work with the files in your SharePoint team site on Office 365. Flick the page twice to the right to move to the SharePoint page. (See Figure 9-6.) Tap Open Link, and type the web address of your team site or document library in the web address field that appears (for example, http://wideworld.sharepoint.com).

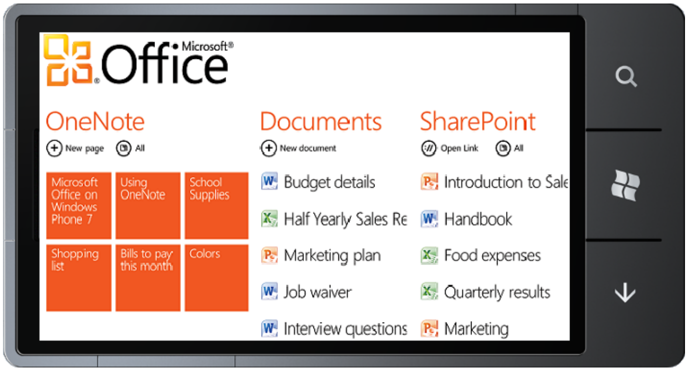

Microsoft® Office
OneNote
New page
All
Microsoft Office on Windows Phone 7
Using OneNote
School Supplies
Shopping list
Bills to pay this month
Colors
Documents
New document
Budget details
Half Yearly Sales Re
Marketing plan
Job waiver
Interview questions
SharePoint
Open Link
All
Introduction to Sale
Handbook
Food expenses
Quarterly results
Marketing

FIGURE 9-6 You can move directly to your team site through the SharePoint page in the Office Hub.

While Office 365 was still in beta, Windows Phone 7 couldn't access an Office 365 SharePoint site directly; instead, users needed to use Internet Explorer on their phones to access their team sites. If you get an error when you try to log directly into your Office 365 account from the SharePoint Online area in the Office Hub, you'll see an Open button that will open the site in your phone's web browser. Tap the button, and your Windows 7 phone does the connecting for you.

Tap the link that takes you to the document library in your SharePoint Team site, and you'll see the list of files stored there. (See Figure 9-7.) You can work with the files at the size you see them on the mobile screen, or you can magnify the display by using the pinch gesture to grab and enlarge the area you want to see more clearly. Table 9-1 gives you a quick introduction to the terminology used for different touch gestures on a Windows 7 phone.

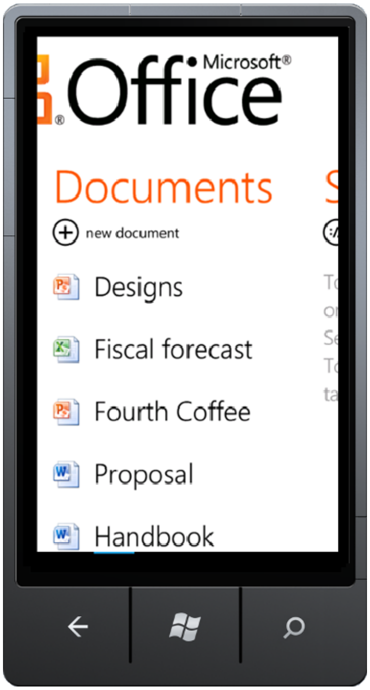

Microsoft®
Office
Documents
new document
Designs
Fiscal forecast
Fourth Coffee
Proposal
Handbook

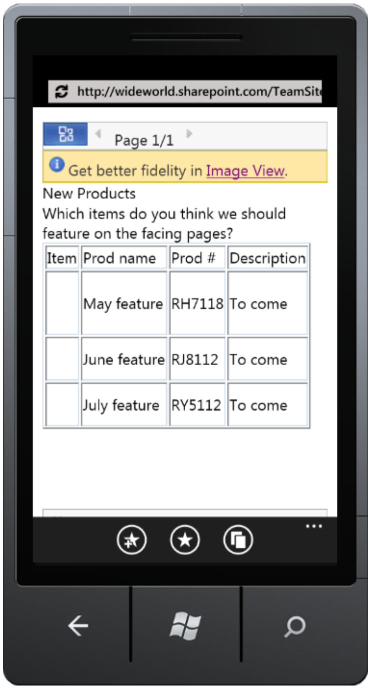
FIGURE 9-7 Your team document library displays files that you can open and work with on your phone.

TABLE 9-1 Touch Gestures on Your Windows 7 Phone

Gesture	Explanation
Tap	Touch the screen once quickly.
DoubleTap	Touch the screen twice quickly.
Hold	Touch and hold your finger on the mobile screen.
Drag	Touch the screen, and move your finger in any direction.
Flick	Drag your finger across the screen, and lift it without stopping.
Pinch	Put two fingers on the screen, and press them together or move them apart.

Last-Minute Word Editing on Your Mobile Device

After you tap the document you want to view, the file opens in the appropriate Office application streamlined for your phone. For example, in Figure 9-8, the Word document opens in the mobile version of the Word. If the document includes multiple pages, you can review the document and move from page to page by tapping the arrows at the top of the screen.



Get better fidelity in Image View.

New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #	Description
	May feature	RH7118	To come
	June feature	RJ8112	To come
	July feature	RY5112	To come

FIGURE 9-8 Word is optimized for your mobile phone so that text is easy to read on the small screen.

If your document includes pictures, you'll see a message bar that says, "Get better fidelity in Image view." Tap the Image view link to display the images in the document.

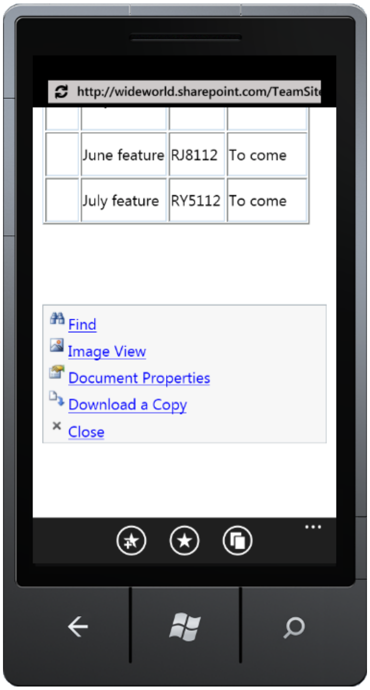
Tip

Editing a Word Document on Your Phone

The editing tasks you can perform on your mobile phone are a bit limited, but you can still get a lot done. You can read through a new report, for example, and make simple edits by correcting spelling, changing words, and adding content. You can change the format of text by boldfacing, italicizing, or underlining it, and you can highlight text and change text color. What's more, you can add comments to the document—which is great if you're reviewing a piece that's being created by your team—and send it on to other team members for their review as well.

That's quite a lot of work you can do while you're on the road! Here are the how-tos for editing your document on your phone:

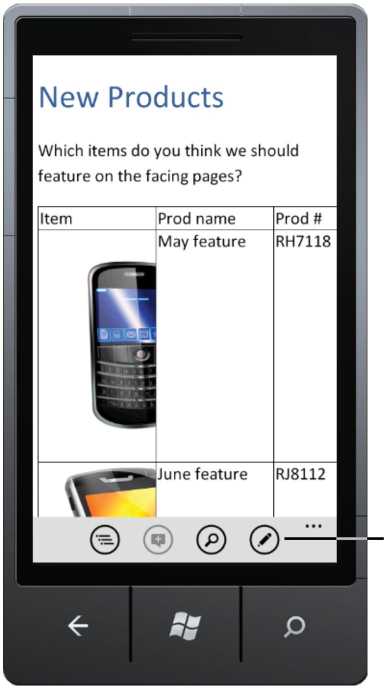
1. Tap the Word program icon in the upper left corner of the display. The file options appear.
2. Tap Download A Copy. (See Figure 9-9.)



	June feature	RJ8112	To come
	July feature	RY5112	To come

FIGURE 9-9 Tap Download A Copy to begin editing the document on your phone.

3. Tap the file icon when prompted.
4. Tap Edit to begin to edit the content. (See Figure 9-10.)



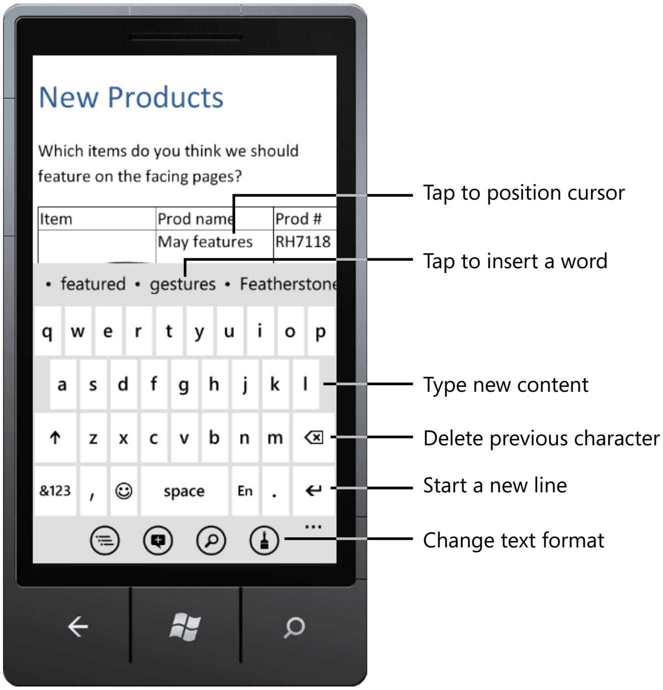
New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #
	May feature	RH7118
	June feature	RJ8112

FIGURE 9-10 Tap Edit to display Windows Phone 7 editing tools.

5. Tap the arrows or flick the screen to move to the place in the document where you want to make the change.
6. Tap a word or space to position the cursor, and then use the keypad to enter new text or correct existing text. (See Figure 9-11.)



New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #
	May features	RH7118

• featured • gestures • Featherstone
q w e r t y u i o p
a s d f g h j k l
z x c v b n m
&123 , space En .
Tap to position cursor
Tap to insert a word
Type new content
Delete previous character
Start a new line
Change text format

FIGURE 9-11 Edit existing content, or add content to your document using the Windows Phone 7 keyboard and prompt text.

Adding Comments

If you're taking a quick look at documents while you're on the road, chances are good that you are reviewing existing documents, reading over something somebody else added, or tweaking a draft you've been working on for a couple of days. In other words, you probably won't be writing long tomes on your phone from scratch. If you're eyeballing a piece for a team member, being able to add your own comments becomes an important feature. Actually, this is helpful anytime you're working on a team, so you can easily see how others feel about the ideas being presented and incorporate the changes in the final document if you choose.

On Windows Phone 7, you have the ability to add comments to your documents when you're working in editing mode. Open the document on your phone as described in the previous section, and tap Edit. Across the bottom of the screen, you'll see the series of four tools: Outline, Comment, Find, and Format. (See Figure 9-12.)

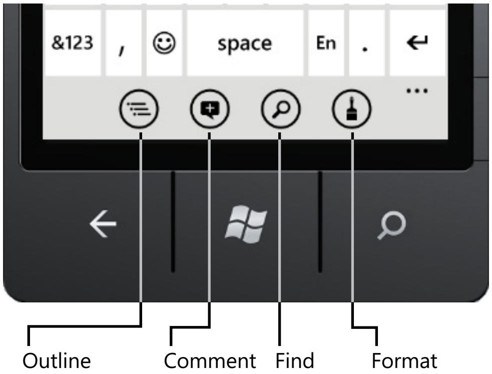
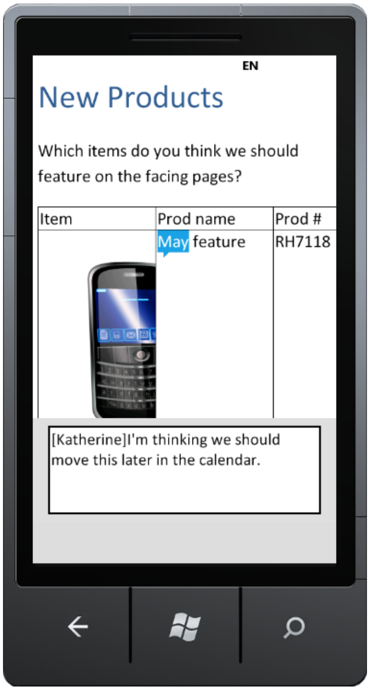


FIGURE 9-12 You can tap Comment to open a comment window and add your notes to the file.

The first screen that appears after you tap Comment asks you to enter your user name so that your note can easily be identified by others who view the file. If you choose to do this, tap in the User box, type your name, and tap Save.

Your document is then displayed, with an open comment box attached to the word at the cursor position. Use the keypad to type your comment and then tap outside the comment box to close it. The word appears highlighted in a kind of conversation bubble, so others can see easily that there is a comment attached to the text. They'll be able to view the comment by tapping the highlight. (See Figure 9-13.)

Tip



New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #
	May feature	RH7118

[Katherine]I'm thinking we should move this later in the calendar.

FIGURE 9-13 The highlighted conversation bubble lets others know there is a comment attached to the text; tap it to display the comment.

Formatting Text

Another simple editing task you might want to do on your phone involves basic formatting. If you're looking over a section about a new product, for example, and you decide that you want to boldface all the places where the product name is mentioned, you can simply tap the product name and then tap Format in the editing tools along the bottom of your phone. The Format window appears, as you see in Figure 9-14. Tap the format you want to apply—Bold, Italic, Underline, Strikethrough, Superscript, or Subscript—and the text changes in your document.

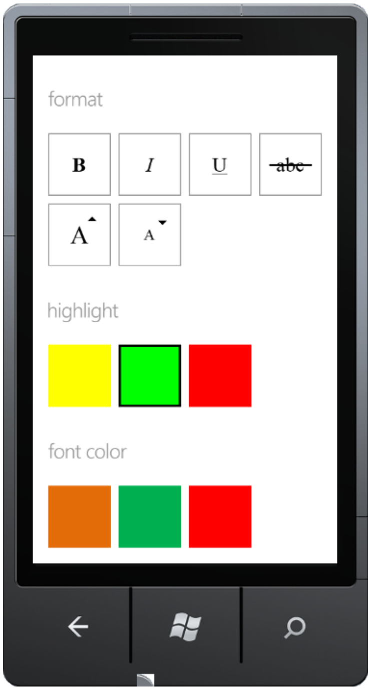
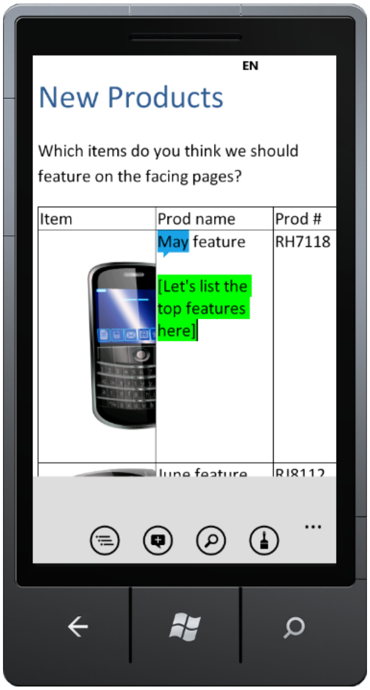


FIGURE 9-14 Tap the format you want to apply to the selected text, or turn on the formatting feature, enter your new text, and turn the feature off.

Similarly, you can highlight words by selecting the text, tapping Format, and tapping the highlight you want. You can turn on the highlight by choosing the settings before you enter new text so that anything you enter appears highlighted. (This is the best technique if you have long passages you want to highlight.) Then turn off highlighting so that the format returns to normal for subsequent entries. (See Figure 9-15.)

Of course, the other tool in the Format window is a no-brainer. You can change the actual color of the text by tapping Format and tapping a new color in the bottom of the Format window.



New Products

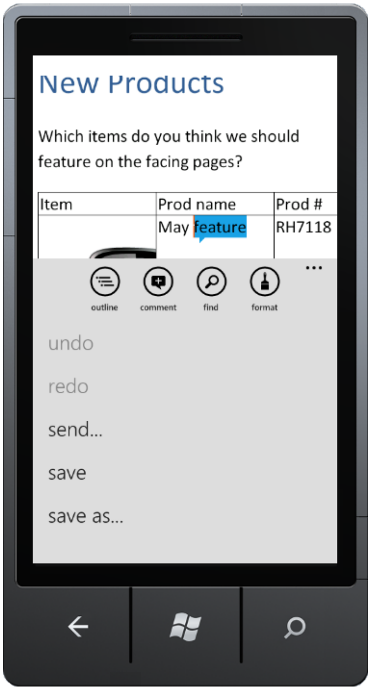
Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #
	May feature [Let's list the top features here]	RH7118
	June feature	RJ8112

FIGURE 9-15 Add highlighted text so that others on your team can find the new content easily.

Saving and Sending Your Edited Document

After you make all these changes to your document, you need to save them and perhaps send the file to your colleagues. Tap the options button (the three dots in the lower right corner of your phone screen) to display additional file options. (See Figure 9-16.)



New Products

Which items do you think we should feature on the facing pages?

Item	Prod name	Prod #
	May feature	RH7118

FIGURE 9-16 Display file options to save and send the document to others.

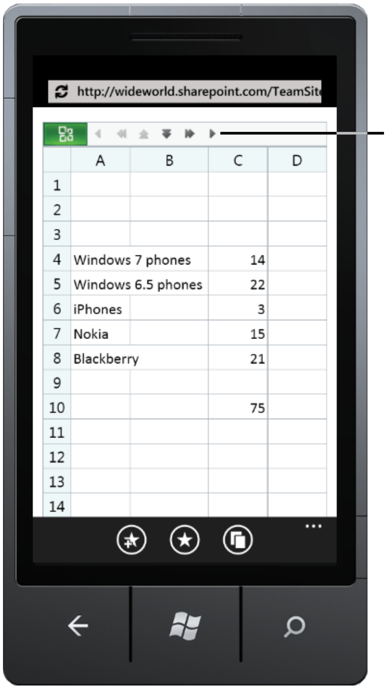
Tap Save to save the document as-is, Save As to save the document under a new name, or Send to send the document without saving a copy on your phone. Windows Phone 7 prompts you to complete the options, and the file goes happily along to your other teammates for their review.

When you're ready, tap the Word icon to display the file options and tap Close to return to the documents in your SharePoint team site.

Reviewing and Updating Excel Data

Working with an Excel worksheet on your mobile device is similar with regard to the basic tools and features you'll use on your phone to review, edit, and format the data in the worksheet file. As you would expect, the display looks different, and the range of commands available to you are different than the ones you'll find in Word. But in general, you'll notice the same, optimized, clean screen display and a set of editing tools that help you review, update, and pass along the worksheet when you're ready.

You begin by opening the worksheet by tapping the file name in the document list on your SharePoint document library screen. When the worksheet opens on your phone, you can tap the arrows at the top to move through the sheet and review it (if necessary) or flick down the page to see additional data. (See Figure 9-17.)



	A	B	C	D
1				
2				
3				
4	Windows 7 phones		14	
5	Windows 6.5 phones		22	
6	iPhones		3	
7	Nokia		15	
8	Blackberry		21	
9				
10			75	
11				
12				
13				
14				

Click to navigate through the worksheet

FIGURE 9-17 The Excel worksheet on Windows Phone 7.

Working with the Worksheet

You can begin to work with the worksheet values and formulas—and display any charts attached to the file—by tapping the Excel icon in the top left corner of your phone display. A menu of tools appears at the bottom of the worksheet. (See Figure 9-18.)

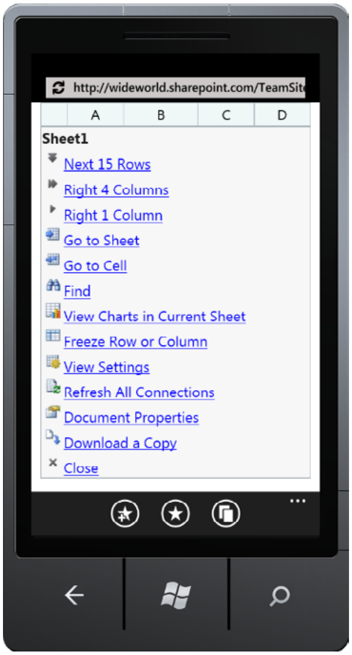

http://wideworld.sharepoint.com/TeamSit
A
B
C
D
Sheet1
Next 15 Rows
Right 4 Columns
Right 1 Column
Go to Sheet
Go to Cell
Find
View Charts in Current Sheet
Freeze Row or Column
View Settings
Refresh All Connections
Document Properties
Download a Copy
Close

FIGURE 9-18 Display Excel worksheet editing tools by tapping the Excel icon in the top left corner of the display.

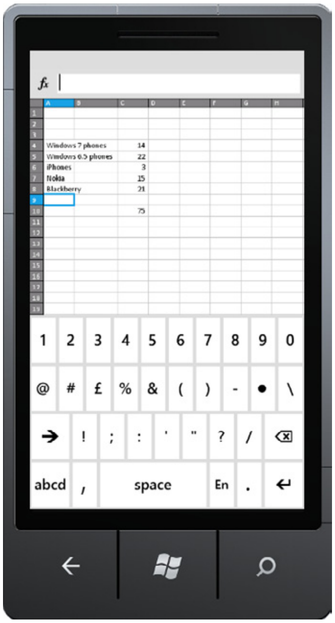
The top five tools in the list enable you to display additional portions of the worksheet, either by scrolling (by tapping Next 15 Rows) or by moving to a specific worksheet or cell.

The Find command enables you to search for a specific value—text or number—on your worksheet. If you'd like to review any charts that are included with the current worksheet, tap View Charts in Current Sheet. (These are not displayed by default.)

Making Simple Editing Changes

If you want to edit the worksheet data, tap Download A Copy, and the Excel worksheet opens on your phone. Tap the cell on the worksheet to select where you want to make changes. Then tap the text or values you want to add, and tap the Enter key. Figure 9-19 shows a worksheet on Windows Phone 7 with editing in progress.

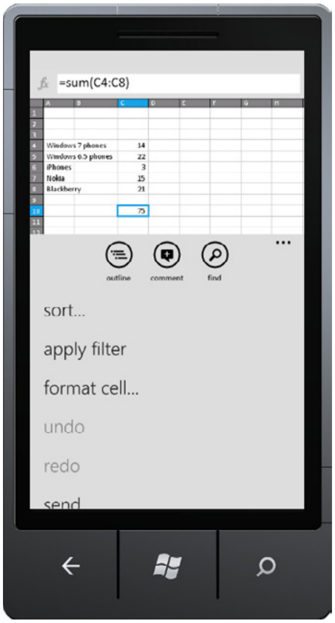
You can display a set of editing options by tapping the options button (the three dots in the lower right corner of your display), as shown in Figure 9-20. Additionally, you'll notice that Excel also offers Outline, Comment, and Find tools so that you can easily review and comment on the content in the worksheet.



	A	B	C
4	Windows 7 phones		14
5	Windows 6.5 phones		22
6	iPhones		3
7	Nokia		15
8	Blackberry		21
9			
10			75

fx
1 2 3 4 5 6 7 8 9 0
@ # £ % & ( ) - • \
! ; : ' " ? /
abcd , space En .

FIGURE 9-19 Tap to select a cell, and then tap your new content.



=sum(C4:C8)

	A	B	C
4	Windows 7 phones		14
5	Windows 6.5 phones		22
6	iPhones		3
7	Nokia		15
8	Blackberry		21
9			
10			75

outline
comment
find
sort...
apply filter
format cell...
undo
redo
send

FIGURE 9-20 Tap the options button to display the tools you need to sort, filter, and format worksheet data.

Here's a simple introduction to each of the editing techniques you can do on your phone:

- Tap Sort to choose the column and order by which you want to sort worksheet data.
- Tap Apply Filter to filter your data so that you can see the Top 10 values or the Bottom 10 values shown.
- Tap Format to display the Format window so that you can change the look of text and values, change the font color, or select a different fill color. (See Figure 9-21.)

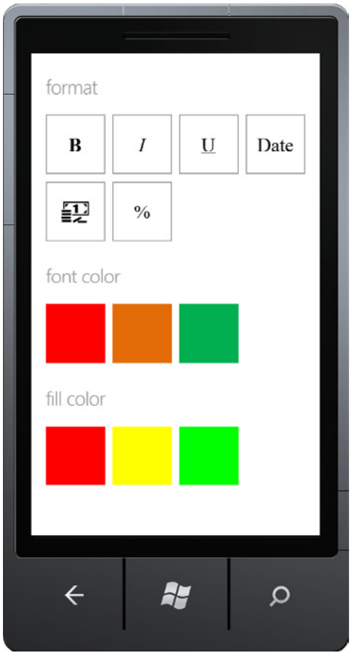


FIGURE 9-21 You can change the format of cells or select a different font color or fill color.

Saving and Sending Worksheet Changes

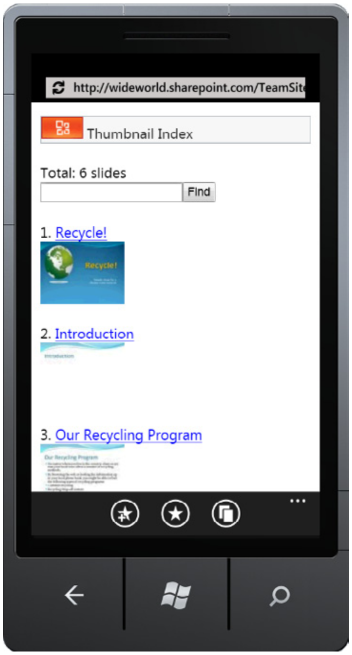
After you've made changes to the worksheet on your phone, you can tap the options button and then flick down to display Save and Save As. Choose Save if you want to store the file on your phone so that you can work on it more later; tap Save As if you want to save the file under a new name. And finally, tap Send if you want to forward the file along to one of your colleagues, so that she can add her own review comments or finalize the file.

To return to the document library on your phone, tap the Excel icon again and tap Close.

Tweaking a PowerPoint Presentation on Your Phone

Even though your PowerPoint slides might be more design than content, you can review them easily on your mobile device and make simple changes to share with your group. You open your presentation in the same way you open Word and Excel files—by tapping them in the SharePoint document library you've created on your Office 365 site.

When it opens on your phone, the first page of your presentation shows all the slides in the presentation in sequence. You can flick down through the list and tap the one you want. Or—and this is a good idea if you have a long presentation—you can use the Search box to enter a word or phrase on the slide you want to view. (See Figure 9-22.) Tap Find to move to the slides with the search text you entered.



http://wideworld.sharepoint.com/TeamSit

Thumbnail Index

Total: 6 slides

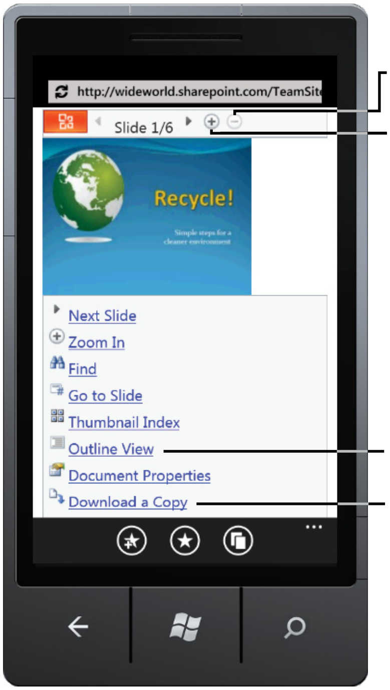
1. Recycle!

2. Introduction

3. Our Recycling Program

FIGURE 9-22 You can search for a specific slide by entering a word or phrase in the Search box and tapping Find.

Tap the link of any slide you want to view, and the slide appears in your display, along with your PowerPoint options. (See Figure 9-23.) You can use the arrows to move through the various slides or tap + or – to magnify or reduce the size of the displayed content. Tap Download A Copy to edit the presentation on your phone.


http://wideworld.sharepoint.com/TeamSite
Slide 1/6
Recycle!
Next Slide
Zoom In
Find
Go to Slide
Thumbnail Index
Outline View
Document Properties
Download a Copy

Tap to reduce the size of the slide

Tap to magnify the slide

Display the presentation outline

Download the presentation for editing

FIGURE 9-23 You can review the presentation or edit it on your phone.

Mobile Editing for Your Presentation

The process for editing a presentation on your phone is easier than you might think. After you tap Download A Copy in the PowerPoint options list, the current slide opens on your phone. Tap the slide and then tap the Edit tool (to the right of the Comment tool in the tools row along the bottom of your phone). You can select an area by tapping it, as shown in Figure 9-24.

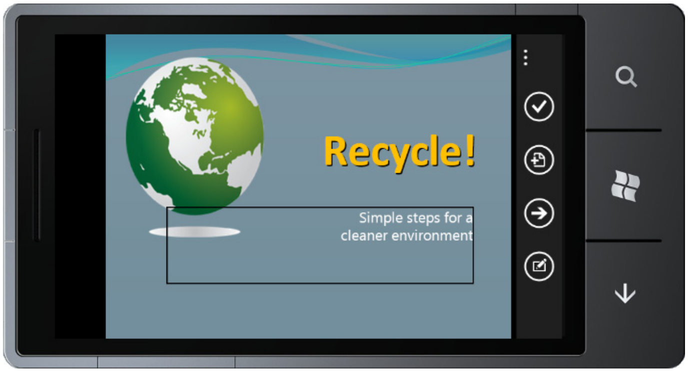

Recycle!
Simple steps for a
cleaner environment

FIGURE 9-24 Tap the area of the slide you want to change.

PowerPoint opens the text area of the slide to enable you to make simple changes in the content. (See Figure 9-25.) Tap to position the cursor, and use the Delete key and the character keys to remove unwanted text and add new content, respectively. When you're finished editing, tap the Done tool. (It resembles a check mark.)

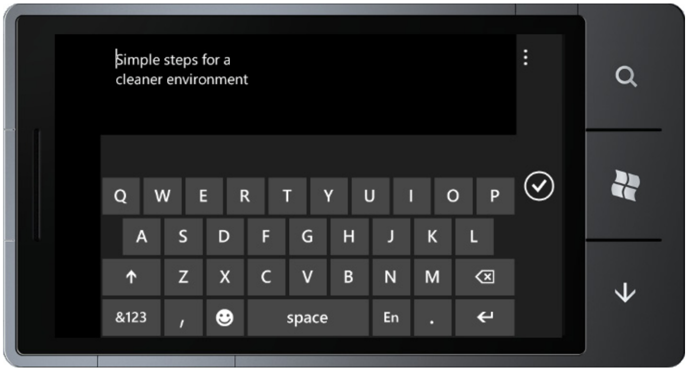

Simple steps for a
cleaner environment
Q W E R T Y U I O P
A S D F G H J K L
Z X C V B N M
&123
,
space
En
.

FIGURE 9-25 Make your changes, and then tap Done.

You can then move on to other slides by tapping the Next button, or you can display additional slide options by tapping the three dots by the tools row. As you can see in Figure 9-26, additional options enable you to move the current slide to a new point in the presentation or hide the slide from view.

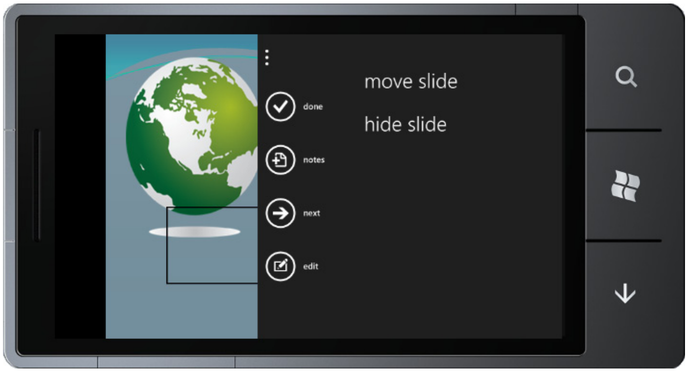

done
notes
next
edit
move slide
hide slide

FIGURE 9-26 You can edit the presentation on your phone and enable ActiveX controls to ensure the animations work properly.

If you decide to move the slide, the process is as simple as tapping and dragging the slide to the new location in the list of slide names. (See Figure 9-27.) The slide is highlighted so that it's easy for you to see and move (and move *back* if you so choose after you've relocated the slide).

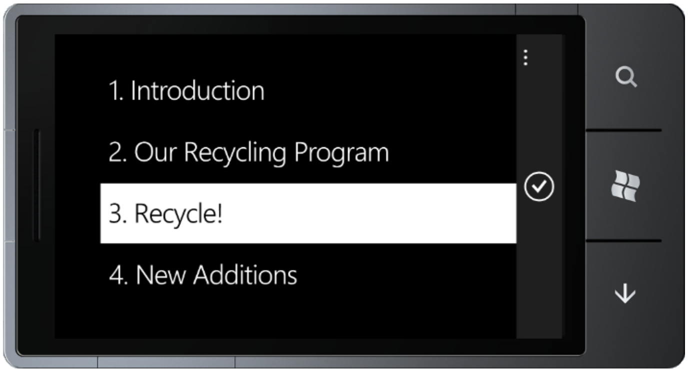

1. Introduction
2. Our Recycling Program
3. Recycle!
4. New Additions

FIGURE 9-27 Reordering slides on your phone is as simple as dragging your finger—literally.

Saving and Sending Your Presentation

Similar to its other Office kin, you can save your PowerPoint presentation by tapping the option dots, flicking down to Save or Save As, and tapping the option you want to use. (See Figure 9-28.) If necessary, enter a name for the file, and then choose to send the presentation wherever you want it to go—to your office email account, to a colleague, to a client.

When you're ready to close the file, tap the Office Button at the top of the display and tap Close. Nice and simple.

Tip

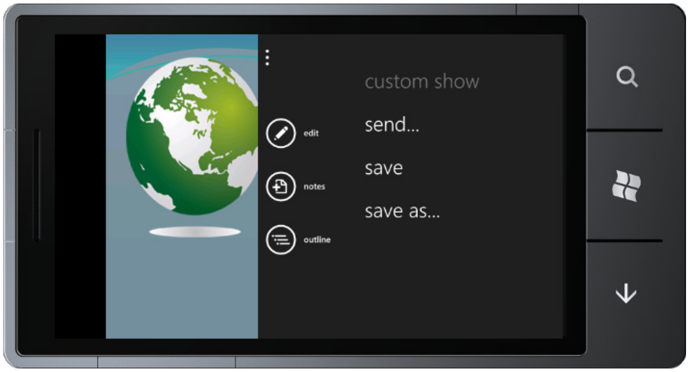


FIGURE 9-28 Save your PowerPoint presentation, and send it on its way.

What's Next

In this chapter, you learned how to use your mobile phone to access and work with files you've saved in SharePoint document libraries in Office 365. Having the option to use your phone to stay in the flow of information for an ongoing project is a great perk, and it helps you get more done, faster and more flexibly. This technology is really just getting started, so you can be sure you'll see many major improvements in mobile connectivity with Office 365 as the software continues to evolve.

The next chapter takes you into the details of managing your email, calendar, contacts, and tasks in Office 365.

3

Connecting in Real Time

NOW THAT YOU'VE set up an account in Office 365 and gotten your team started in the right direction, this part of the book helps you think through connecting to others through email, instant messaging, and your public website. You also see how all the tools in Office 365 can be used together to help you accomplish specific business goals.

CHAPTER 10

Email and Organize with Office 365

IN THIS CHAPTER:

- Introducing Outlook Web App
- Checking and managing email
- Working with your calendar
- Importing and managing your contacts
- Adding and completing tasks
- What's next

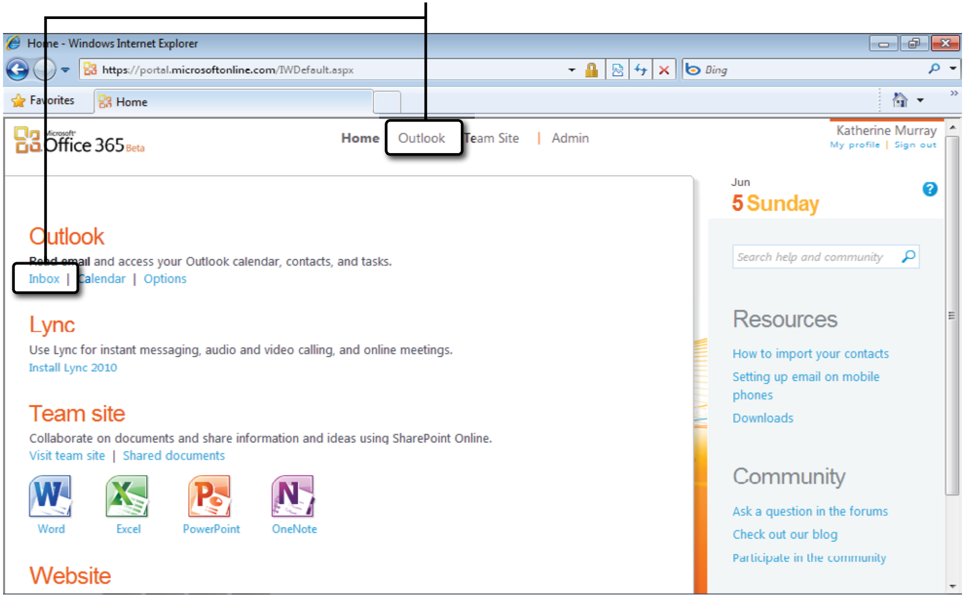
BY NOW, YOU MIGHT be proficient at organizing your contacts, managing your calendar, and staying in touch through email. But being able to coordinate all those things—for yourself and for your team—in Office 365 enables you to keep all the information you need for your group flowing smoothly and easily. Using Outlook Web App, you can easily add contacts, manage your mail, search for colleagues, add appointments to your calendar, and keep an eye on the tasks—individual and collective—your team needs to complete.

This chapter introduces you to the ways you can manage your people and project information in Office 365.

Introducing Outlook Web App

After you log in to Office 365, you can display your Inbox by clicking Outlook at the top of the Office 365 Home page or by clicking Inbox in the Outlook area on the left side of the window. (See Figure 10-1.)

Click either link to display the Inbox.



Home - Windows Internet Explorer
https://portal.microsoftonline.com/IWDefault.aspx
Bing
Favorites
Home
Microsoft Office 365 Beta
Home
Outlook
Team Site
Admin
Katherine Murray
My profile | Sign out
Jun
5 Sunday
Search help and community
Outlook
Inbox | Calendar | Options
Lync
Install Lync 2010
Team site
Visit team site | Shared documents
Word
Excel
PowerPoint
OneNote
Website
Resources
How to import your contacts
Setting up email on mobile phones
Downloads
Community
Ask a question in the forums
Check out our blog
Participate in the community

Read email and access your Outlook calendar, contacts, and tasks.

Use Lync for instant messaging, audio and video calling, and online meetings.

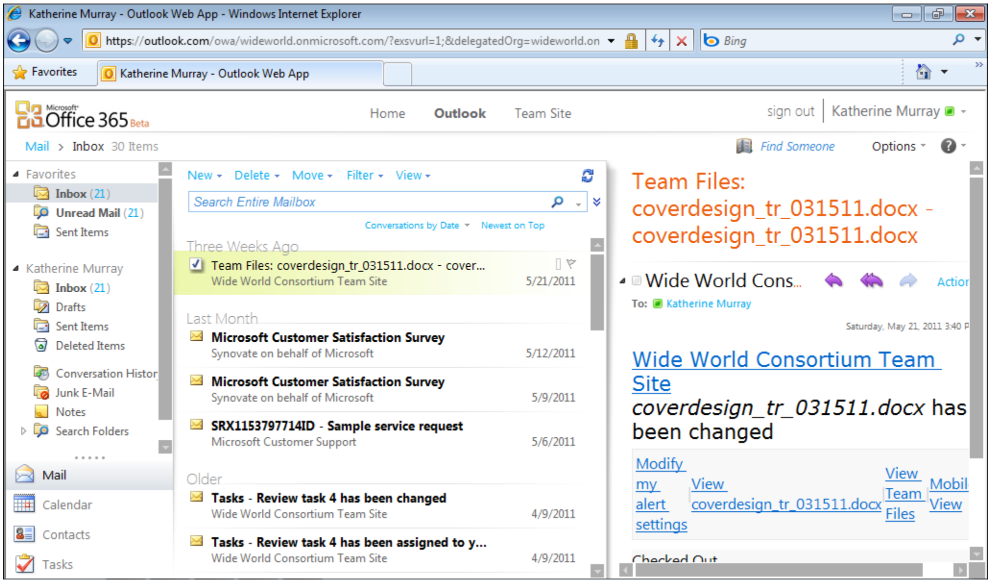
Collaborate on documents and share information and ideas using SharePoint Online.

FIGURE 10-1 Display Outlook Web App by clicking Outlook or Inbox on the Office 365 Home page.

Checking and Managing Email

One of the great things about Outlook Web App in Office 365 is that your mail—and contacts—are always right there when you need them, available through any device that gives you access to the web. In Chapter 9, "Going Mobile with Office 365," you learned how to review and send email on your phone; Outlook Web App gives you the online, web-based ability to read new mail, work with received mail, and organize all your communication preferences in just the way you want.

The window is organized in three main areas. (See Figure 10-2.) In the left panel, you see the mail folders as well as the Outlook tools that take you to other views so that you can work with your Calendar or manage contacts or tasks. In the center is the Inbox column, where your new mail appears. The panel on the right is the reading pane, which shows you the contents of the selected message without you needing to open the message in the Web App.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?exsvurl=1;&delegatedOrg=wideworld.on
Bing
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (21)
Unread Mail (21)
Sent Items
Katherine Murray
Inbox (21)
Drafts
Sent Items
Deleted Items
Conversation Histor
Junk E-Mail
Notes
Search Folders
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Three Weeks Ago
Last Month
Older
Actior

Team Files: coverdesign_tr_031511.docx - cover... Wide World Consortium Team Site 5/21/2011

Microsoft Customer Satisfaction Survey Synovate on behalf of Microsoft 5/12/2011

Microsoft Customer Satisfaction Survey Synovate on behalf of Microsoft 5/9/2011

SRX1153797714ID - Sample service request Microsoft Customer Support 5/6/2011

Tasks - Review task 4 has been changed Wide World Consortium Team Site 4/9/2011

Tasks - Review task 4 has been assigned to y... Wide World Consortium Team Site 4/9/2011

Team Files: coverdesign_tr_031511.docx - coverdesign_tr_031511.docx

Wide World Cons...

To: Katherine Murray

Saturday, May 21, 2011 3:40 P

Wide World Consortium Team Site

coverdesign_tr_031511.docx has been changed

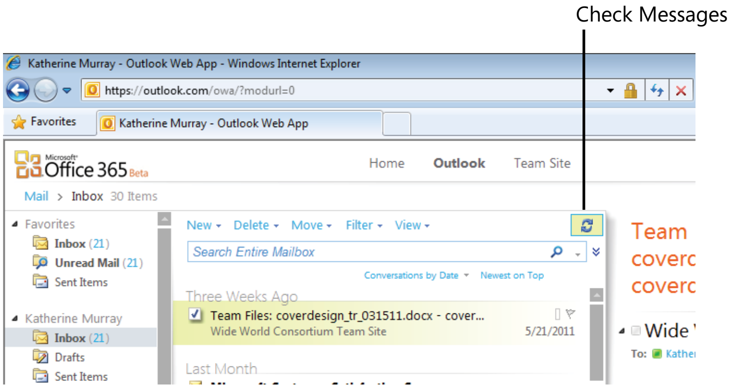
Modify my alert settings | View coverdesign_tr_031511.docx | View Team Files | Mobil View

Checked Out

FIGURE 10-2 The Outlook Web App window gives you access to your messages as well as the other Outlook tools.

Checking, Reading, and Responding to Your Mail

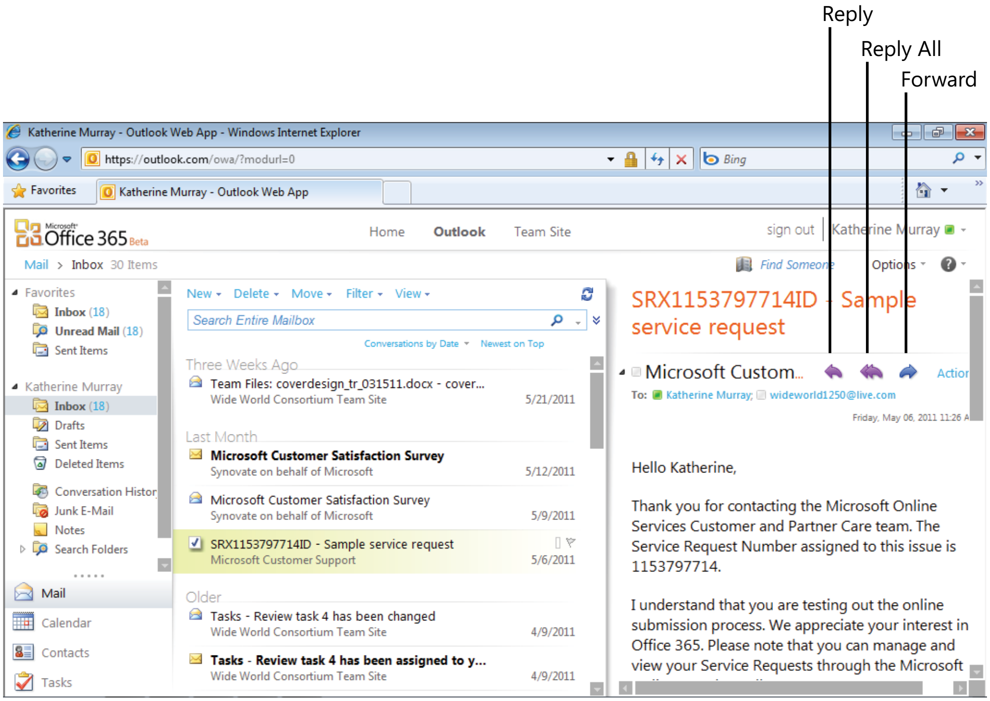
Your mail arrives in your Inbox automatically, but you can also have Outlook search for new messages by clicking the Check Messages tool at the top of the Inbox pane in the center of the Outlook Web App window. (See Figure 10-3.)


Check Messages
Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/?modurl=0
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
Mail > Inbox 30 Items
Favorites
Inbox (21)
Unread Mail (21)
Sent Items
Katherine Murray
Inbox (21)
Drafts
Sent Items
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Three Weeks Ago
Last Month

Team Files: coverdesign_tr_031511.docx - cover... Wide World Consortium Team Site 5/21/2011

FIGURE 10-3 Click Check Messages if you want to see whether any additional messages are available for downloading.

The messages appear in the Inbox column in the center of the Outlook window. To read a specific message, you can click it in the Inbox column and it appears in the Reading pane on the right side of the Outlook window. (See Figure 10-4.)


Reply
Reply All
Forward
Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/?modurl=0
Bing
Favorites
Katherine Murray - Outlook Web App
Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (18)
Unread Mail (18)
Sent Items
Katherine Murray
Inbox (18)
Drafts
Sent Items
Deleted Items
Conversation Histor
Junk E-Mail
Notes
Search Folders
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Three Weeks Ago
Team Files: coverdesign_tr_031511.docx - cover...
Wide World Consortium Team Site 5/21/2011
Last Month
Microsoft Customer Satisfaction Survey
Synovate on behalf of Microsoft 5/12/2011
Microsoft Customer Satisfaction Survey
Synovate on behalf of Microsoft 5/9/2011
SRX1153797714ID - Sample service request
Microsoft Customer Support 5/6/2011
Older
Tasks - Review task 4 has been changed
Wide World Consortium Team Site 4/9/2011
Tasks - Review task 4 has been assigned to y...
Wide World Consortium Team Site 4/9/2011
SRX1153797714ID - Sample service request
Microsoft Custom...
Actior
To: Katherine Murray; wideworld1250@live.com
Friday, May 06, 2011 11:26 A

Hello Katherine,

Thank you for contacting the Microsoft Online Services Customer and Partner Care team. The Service Request Number assigned to this issue is 1153797714.

I understand that you are testing out the online submission process. We appreciate your interest in Office 365. Please note that you can manage and view your Service Requests through the Microsoft

FIGURE 10-4 Click a message in the Inbox to display the message content in the Reading pane.

You can reply to a message by clicking Reply (or Reply All, if the message was sent to more than one recipient) or clicking Forward directly from the Reading Pane. The message opens in a message window so that you can type the content you want to send, add any other recipients you want to receive the message, and click Send.

Creating a New Message

Of course, every message you want to send to others won't necessarily be a response to a message someone else sends you. Sometimes you'll need to create a new message and send it directly to a recipient—or many recipients. Outlook Web App makes this very simple. Here are the steps:

1. In the Office 365 Home page, click Outlook.
2. In the Outlook Web App window, click the arrow to the right of New.

3. Click Message. (See Figure 10-5.)

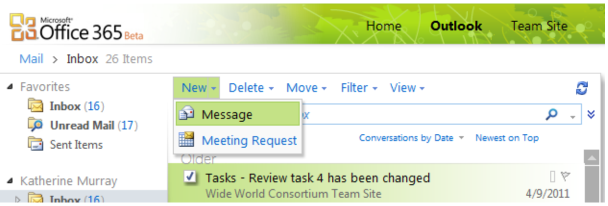

Microsoft Office 365 Beta
Home
Outlook
Team Site
Mail > Inbox 26 Items
Favorites
Inbox (16)
Unread Mail (17)
Sent Items
Katherine Murray
Inbox (16)
New
Delete
Move
Filter
View
Message
Meeting Request
Conversations by Date
Newest on Top
Older
Tasks - Review task 4 has been changed
Wide World Consortium Team Site
4/9/2011

FIGURE 10-5 Begin a new email message by clicking New and choosing Message.

4. The new message window appears, as you see in Figure 10-6. Type the email address in the To field, the message topic in the Subject line, and the content of the message you want to send.

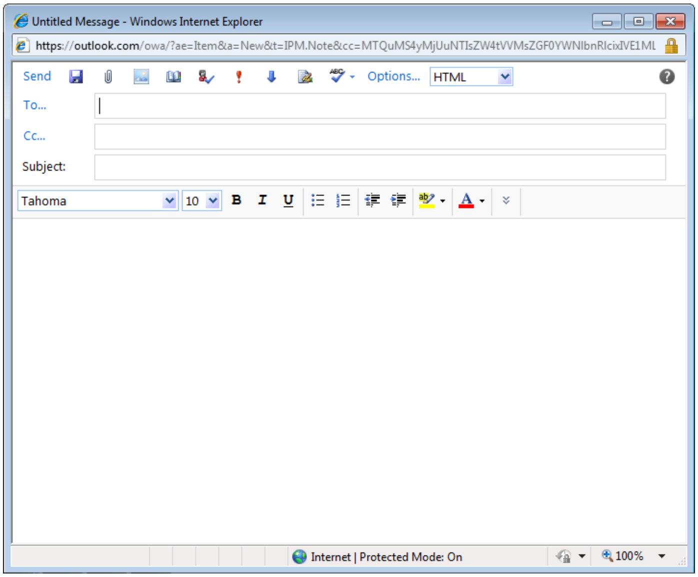
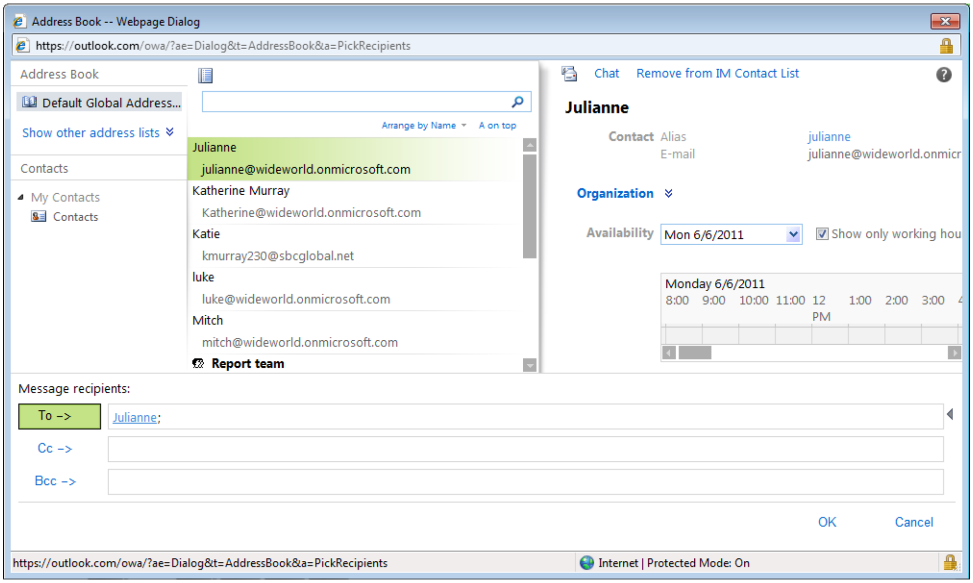

Untitled Message - Windows Internet Explorer
https://outlook.com/owa/?ae=Item&a=New&t=IPM.Note&cc=MTQuMS4yMjUuNTIsZW4tVVMsZGF0YWNlbnRlcixIVE1ML
Send
Options...
HTML
To...
Cc...
Subject:
Tahoma
10
B
I
U
Internet | Protected Mode: On
100%

FIGURE 10-6 Enter the email addresses of recipients in the To line, add a subject, and type the body of your message.

5. Alternatively, you can click To and choose the name of the recipient in the Address Book window. (See Figure 10-7.)
6. Click To, and click OK.
7. When your message is complete, click Send to send it to the recipient.


Address Book -- Webpage Dialog
https://outlook.com/owa/?ae=Dialog&t=AddressBook&a=PickRecipients
Address Book
Default Global Address...
Show other address lists
Contacts
My Contacts
Contacts
Arrange by Name
A on top
Julianne
julianne@wideworld.onmicrosoft.com
Katherine Murray
Katherine@wideworld.onmicrosoft.com
Katie
kmurray230@sbcglobal.net
luke
luke@wideworld.onmicrosoft.com
Mitch
mitch@wideworld.onmicrosoft.com
Report team
Chat
Remove from IM Contact List
Julianne
Contact
Alias
julianne
E-mail
julianne@wideworld.onmicr
Organization
Availability
Mon 6/6/2011
☑ Show only working hou
Monday 6/6/2011
8:00
9:00
10:00
11:00
12 PM
1:00
2:00
3:00
Cc ->
Bcc ->
OK
Cancel
https://outlook.com/owa/?ae=Dialog&t=AddressBook&a=PickRecipients
Internet | Protected Mode: On

Message recipients:

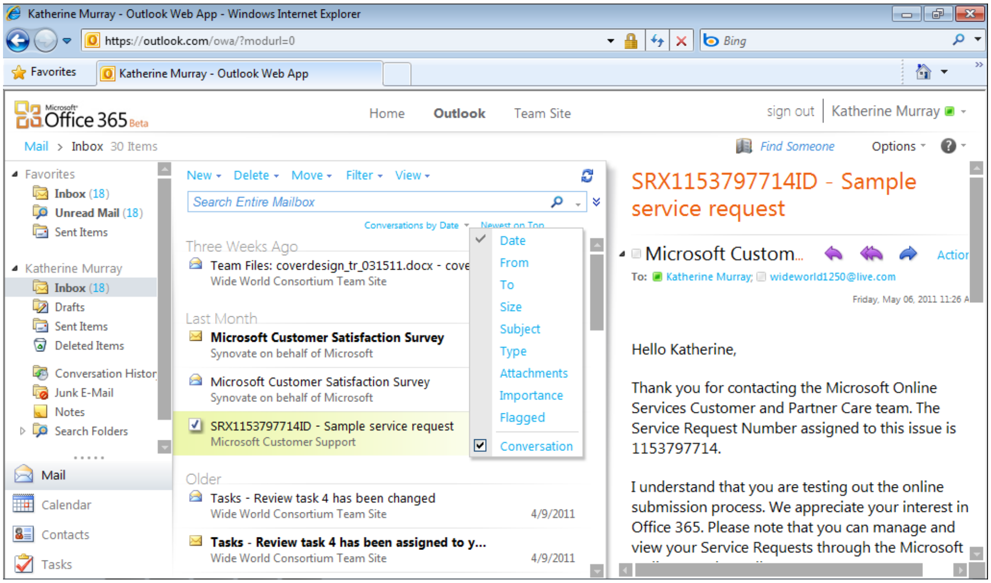
To -> Julianne;

FIGURE 10-7 Click the name of the contact to whom you want to send the message, and click To.

Changing Mail Views

By default, the mail in your Inbox is displayed in Conversation view. This is a new view in Office 2010 that weaves together the various messages involved in a conversation so that you can read it as a complete entity. This helps you keep all discussion about specific topics together so that you can easily follow the thoughts of your group as ideas develop.

You can change the way the messages are organized in the Inbox, or turn off Conversation view, by clicking the Conversations By Date arrow at the top of the Inbox column. (See Figure 10-8.)


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/?modurl=0
Bing
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (18)
Unread Mail (18)
Sent Items
Katherine Murray
Inbox (18)
Drafts
Sent Items
Deleted Items
Conversation Histor
Junk E-Mail
Notes
Search Folders
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Date
From
To
Size
Subject
Type
Attachments
Importance
Flagged
☑ Conversation
Three Weeks Ago
Last Month
Older
Microsoft Custom...
Action

Team Files: coverdesign_tr_031511.docx - cove
Wide World Consortium Team Site

Microsoft Customer Satisfaction Survey
Synovate on behalf of Microsoft

Microsoft Customer Satisfaction Survey
Synovate on behalf of Microsoft

SRX1153797714ID - Sample service request
Microsoft Customer Support

Tasks - Review task 4 has been changed
Wide World Consortium Team Site 4/9/2011

Tasks - Review task 4 has been assigned to y...
Wide World Consortium Team Site 4/9/2011

SRX1153797714ID - Sample service request

To: Katherine Murray; wideworld1250@live.com

Friday, May 06, 2011 11:26 A

Hello Katherine,

Thank you for contacting the Microsoft Online Services Customer and Partner Care team. The Service Request Number assigned to this issue is 1153797714.

I understand that you are testing out the online submission process. We appreciate your interest in Office 365. Please note that you can manage and view your Service Requests through the Microsoft

FIGURE 10-8 You can choose to organize messages in the Inbox in a variety of ways.

If you want to turn off Conversation view, click Conversation to clear the check box.

To rearrange the messages in the Inbox, click one of the other categories from the list. If you choose From, for example, the messages are arranged in alphabetical order according to the person who sent the message.

Choosing a New Theme

You can apply a new look to your mail activities by choosing a new theme for the Outlook Web App window. You'll find the controls you need in the Options tool in the upper right corner of the window. Click the Options arrow, and click one of the arrows in the Select A Theme gallery to browse the available themes. (See Figure 10-9.) Click the theme you want, and it is applied to the Outlook Web App window.

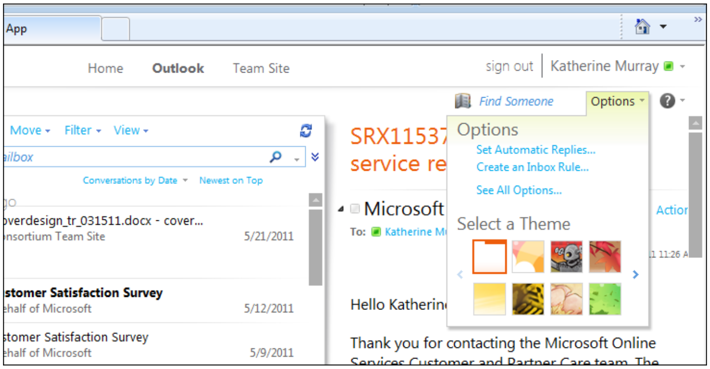

App
Home
Outlook
Team Site
sign out
Katherine Murray
Find Someone
Options
Move
Filter
View
ilbox
Conversations by Date
Newest on Top
Options
Set Automatic Replies...
Create an Inbox Rule...
See All Options...
Select a Theme
SRX11537
service re
Microsoft
To: Katherine M
Actior
verdesign_tr_031511.docx - cover...
nsortium Team Site
5/21/2011
stomer Satisfaction Survey
half of Microsoft
5/12/2011
tomer Satisfaction Survey
half of Microsoft
5/9/2011
Hello Katherin
Thank you for contacting the Microsoft Online

FIGURE 10-9 Page through the available themes by clicking the arrows in the Select A Theme gallery.

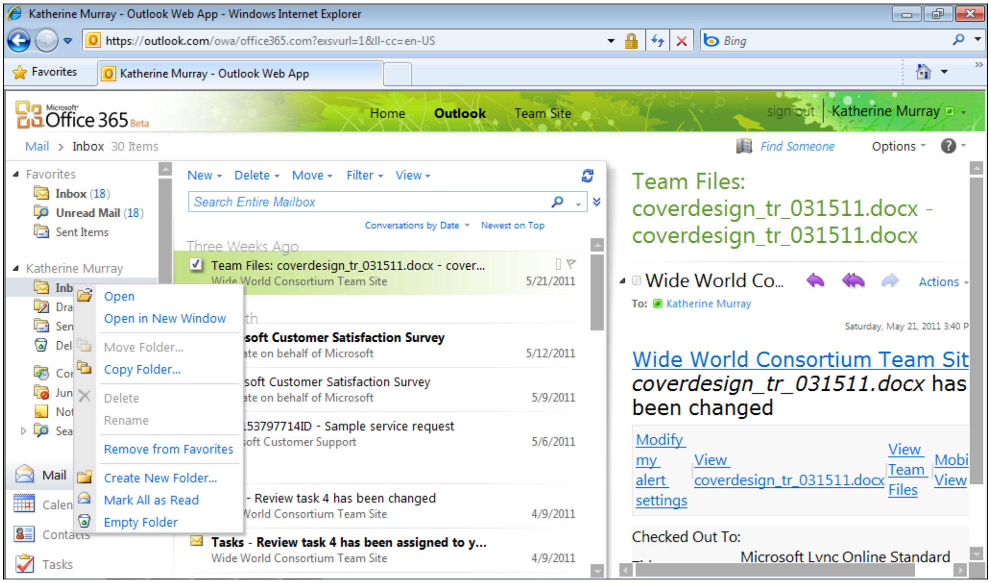
The theme change you make in Outlook Web App affects only the mail utility and doesn't apply to your other Office 365 programs.

Managing Your Mail

The more email you receive, the more important it becomes to have a smart way of organizing it so that you can find it easily later. You might want to organize your projects in different folders, for example, to group items together by the task they represent (such as Design, Writing, Production, and other such categories). You can then move messages into the appropriate folders, delete message you no longer need, search for specific messages, or filter the mail to see only select messages.

Creating New Mail Folders

You can easily create new folders and then move your messages to those folders while you're working in Outlook Web App. Begin by right-clicking the Inbox in the folders view on the left side of the Outlook Web App window. A content menu appears, as Figure 10-10 shows.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/office365.com?exsvurl=1&ll-cc=en-US
Bing
Favorites
Katherine Murray - Outlook Web App
Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (18)
Unread Mail (18)
Sent Items
Katherine Murray
Open
Open in New Window
Move Folder...
Copy Folder...
Delete
Rename
Remove from Favorites
Create New Folder...
Mark All as Read
Empty Folder
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversations by Date
Newest on Top
Three Weeks Ago
Actions

Team Files: coverdesign_tr_031511.docx - cover... Wide World Consortium Team Site 5/21/2011

soft Customer Satisfaction Survey ate on behalf of Microsoft 5/12/2011

soft Customer Satisfaction Survey ate on behalf of Microsoft 5/9/2011

153797714ID - Sample service request oft Customer Support 5/6/2011

- Review task 4 has been changed World Consortium Team Site 4/9/2011

Tasks - Review task 4 has been assigned to y... Wide World Consortium Team Site 4/9/2011

Team Files: coverdesign_tr_031511.docx - coverdesign_tr_031511.docx

Wide World Co...

To: Katherine Murray

Saturday, May 21, 2011 3:40 P

Wide World Consortium Team Sit

coverdesign_tr_031511.docx has been changed

Modify my alert settings | View coverdesign_tr_031511.docx | View Team Files | Mobi View

Checked Out To: Microsoft Lvnc Online Standard

FIGURE 10-10 Right-click the Inbox folder to display a list of folder options.

If you click Create New Folder, Outlook adds a folder in the folder list. Type a name for the new folder. You can create additional folders—and subfolders within folders—to keep your messages organized.

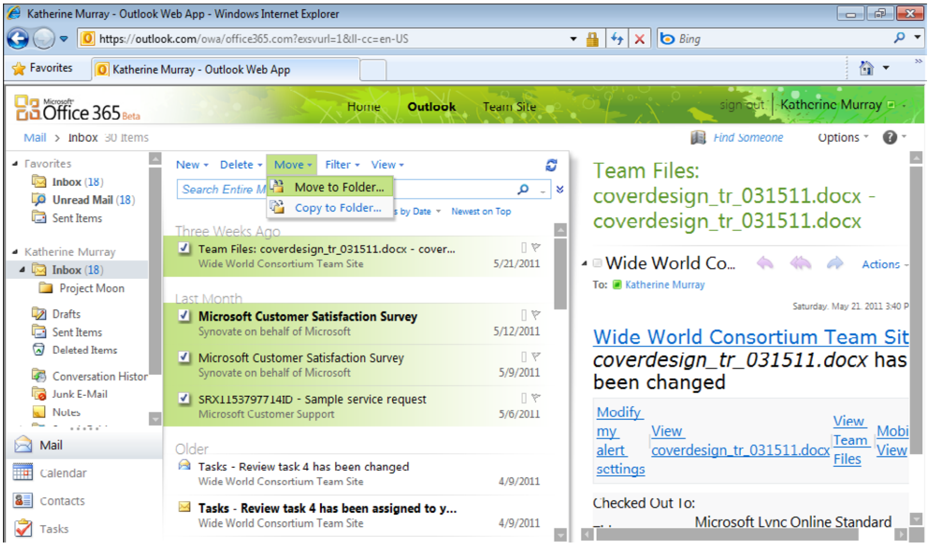
Tip

Moving Messages

The easiest way to move a message to a folder is simply to drag it from your Inbox to the folder where you want it to be stored. When you release the mouse button, the message is filed in the folder. You can also use tools in Outlook Web App to move messages from place to place. This technique comes in handy especially when you need to move multiple messages at once. Here are the steps:

1. Hover the mouse pointer over the small mail icon at the far left of each message you want to select. The icon changes to a check box.

2. Select the check box to specify which message you want to move.
3. Repeat steps 1 and 2 to select all messages you want to move to the new folder.
4. Click the arrow to the right of Move, and click Move To Folder. (See Figure 10-11.)
5. When prompted, click the name of the folder you just created and click Move.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/office365.com?exsvurl=1&ll-cc=en-US
Bing
Favorites
Katherine Murray - Outlook Web App
Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 30 Items
Find Someone
Options
Favorites
Inbox (18)
Unread Mail (18)
Sent Items
Katherine Murray
Inbox (18)
Project Moon
Drafts
Sent Items
Deleted Items
Conversation Histor
Junk E-Mail
Notes
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire M
Move to Folder...
Copy to Folder...
by Date
Newest on Top
Three Weeks Ago
Last Month
Older
Actions
Modify my alert settings
View coverdesign_tr_031511.docx
View Team Files
Mobi View

☑ Team Files: coverdesign_tr_031511.docx - cover... Wide World Consortium Team Site 5/21/2011

☑ Microsoft Customer Satisfaction Survey Synoyate on behalf of Microsoft 5/12/2011

☑ Microsoft Customer Satisfaction Survey Synoyate on behalf of Microsoft 5/9/2011

☑ SRX1153797714ID - Sample service request Microsoft Customer Support 5/6/2011

Tasks - Review task 4 has been changed Wide World Consortium Team Site 4/9/2011

Tasks - Review task 4 has been assigned to y... Wide World Consortium Team Site 4/9/2011

Team Files: coverdesign_tr_031511.docx - coverdesign_tr_031511.docx

Wide World Co...

To: Katherine Murray

Saturday, May 21, 2011 3:40 P

Wide World Consortium Team Sit

coverdesign_tr_031511.docx has been changed

Checked Out To:

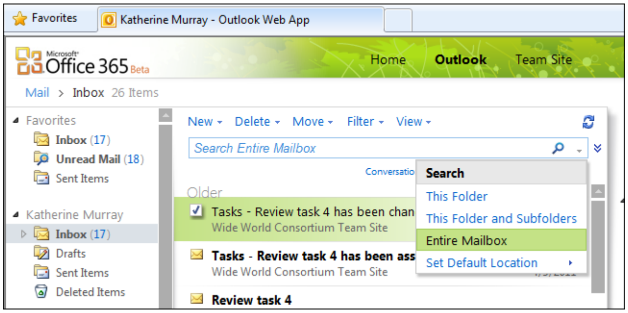
Microsoft Lync Online Standard

FIGURE 10-11 Select the messages you want to move, and click Move and Move To Folder.

Searching for Messages

When you are looking for a message from a particular person about a certain subject, you can locate the message quickly by searching for it. The search box appears at the top of the Inbox column in the center of the Outlook Web App window.

Simply click in the search box and type the word or phrase you want to find and click the Search tool. By default, Outlook searches the entire mailbox, but you can change where the search is performed by clicking the arrow on the right end of the search box and choosing another option. (See Figure 10-12.)


Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
Mail > Inbox 26 Items
Favorites
Inbox (17)
Unread Mail (18)
Sent Items
Katherine Murray
Inbox (17)
Drafts
Sent Items
Deleted Items
New
Delete
Move
Filter
View
Search Entire Mailbox
Conversatio
Older
Search
This Folder
This Folder and Subfolders
Entire Mailbox
Set Default Location

Tasks - Review task 4 has been chan
Wide World Consortium Team Site

Tasks - Review task 4 has been ass
Wide World Consortium Team Site

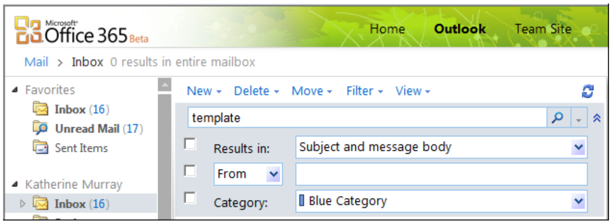
Review task 4

FIGURE 10-12 Choose where you want Outlook to search for the topic you specify.

Tip

Outlook displays any messages whose subject line or body text contains the word or phrase you entered. You can then review the messages to find the one you're looking for.

You can further narrow the search by using Outlook's advanced search features. Click the double arrow at the far right end of the search box area to display Advanced Search tools. A set of tools appears as shown in Figure 10-13 that enables you to change where the results are found, who sent or received the message, and how the message is categorized. Select the check box to the left of the item you want to change, and enter the new setting for the item in the fields on the right. Click Search again to initiative the advanced search, and the results appear in the Inbox panel.


Microsoft Office 365 Beta
Home
Outlook
Team Site
Mail > Inbox 0 results in entire mailbox
Favorites
Inbox (16)
Unread Mail (17)
Sent Items
Katherine Murray
Inbox (16)
New
Delete
Move
Filter
View

template

☐ Results in: Subject and message body

☐ From

☐ Category: Blue Category

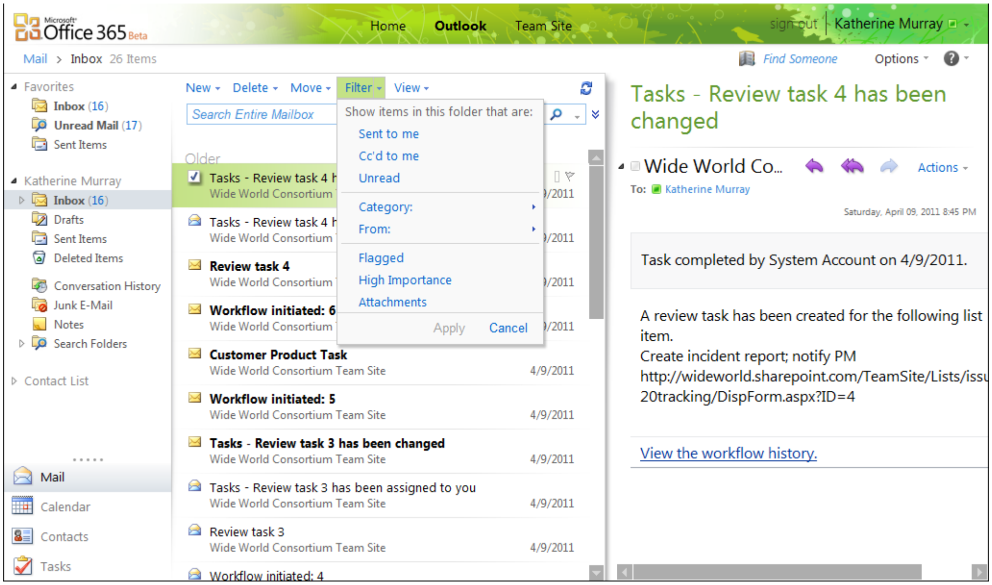
FIGURE 10-13 Enter advanced search settings to narrow your search.

When you're ready to clear the search results and return to the normal Outlook display, simply click the Cancel tool (the red X) to the right of the search box. Your Inbox returns to normal.

Filtering Your Mail

Depending on how much mail you receive—and from whom—you might also want to set up a filter on your email to display only the messages with a certain characteristic. For example, if you're trying to find a message that had an attachment of a PDF you need, but you can't remember who sent it, you can filter your messages to show only those that had attachments.

Here's how to do it. In Outlook Web App, click the Filter arrow in the tools above the Inbox column. A list of possible filters appears. (See Figure 10-14.) Click the one you want to apply to the messages in the current folder.


Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Mail > Inbox 26 Items
Find Someone
Options
Favorites
Inbox (16)
Unread Mail (17)
Sent Items
Katherine Murray
Inbox (16)
Drafts
Sent Items
Deleted Items
Conversation History
Junk E-Mail
Notes
Search Folders
Contact List
Mail
Calendar
Contacts
Tasks
New
Delete
Move
Filter
View
Search Entire Mailbox
Older
Show items in this folder that are:
Sent to me
Cc'd to me
Unread
Category:
From:
Flagged
High Importance
Attachments
Apply
Cancel
Tasks - Review task 4 h
Wide World Consortium
Tasks - Review task 4 h
Wide World Consortium
Review task 4
Wide World Consortium
Workflow initiated: 6
Wide World Consortium
Customer Product Task
Wide World Consortium Team Site 4/9/2011
Workflow initiated: 5
Wide World Consortium Team Site 4/9/2011
Tasks - Review task 3 has been changed
Wide World Consortium Team Site 4/9/2011
Tasks - Review task 3 has been assigned to you
Wide World Consortium Team Site 4/9/2011
Review task 3
Wide World Consortium Team Site 4/9/2011
Workflow initiated: 4
Actions

Tasks - Review task 4 has been changed

Wide World Co...

To: Katherine Murray

Saturday, April 09, 2011 8:45 PM

Task completed by System Account on 4/9/2011.

A review task has been created for the following list item.
Create incident report; notify PM
http://wideworld.sharepoint.com/TeamSite/Lists/issu
20tracking/DispForm.aspx?ID=4

View the workflow history.

FIGURE 10-14 Use filters to cut down on the number of messages displayed in the current folder.

If you choose the Category filter or the From filter, you have an extra step with each one. When you click Category, a list of category styles appears so that you can choose the category you want to see. When you click From, a text box appears so that you can type the sender's email address and display only the messages that person sent.

The Inbox title shows the name of any title currently in use. Along the right side of the Inbox title row, you see a tool that enables you to add the current filter to your list of Favorites, or to clear the filter and return the display to normal. (See Figure 10-15.) Click Clear Filter to remove the filter and display all messages in the Inbox once again.

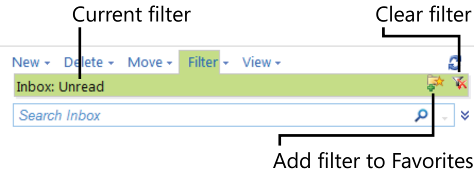


FIGURE 10-15 Click Clear Filter when you want to show all messages once again.

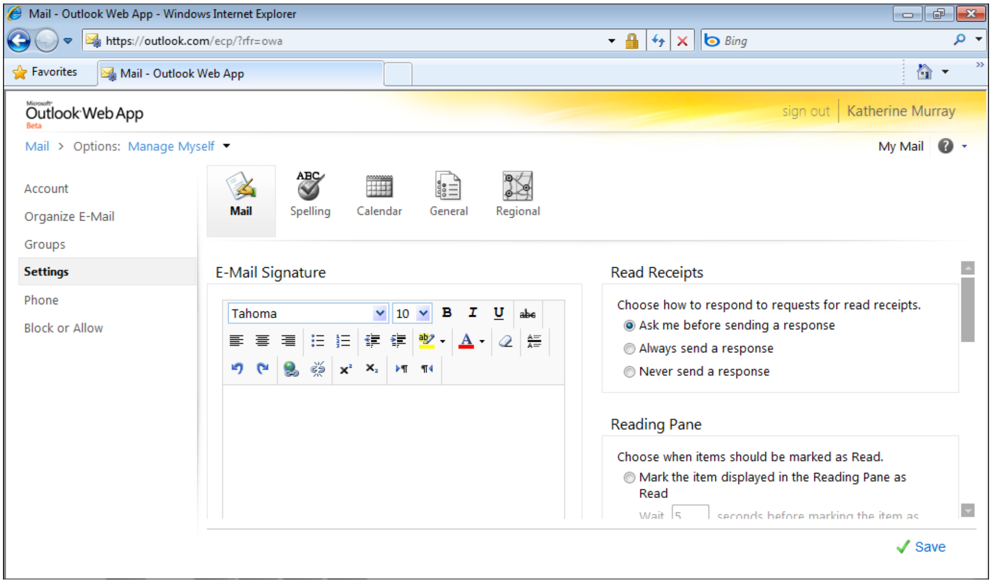
CREATING AN INBOX RULE

Perhaps you'd like to automate your messages so that they're filed automatically into their respective folders. Suppose, for example, that your managers are required to file a manager's report each Friday, but you don't typically look at them until just before your online manager's meeting the following Wednesday. You can create an Inbox rule to move the messages to your Reports folder until you're ready to look at them. This clears up the space in your Inbox for the messages you really need to see.

To create an Inbox Rule, click Options in the upper right corner of the Outlook Web App window and choose Create An Inbox Rule. Click New, choose which messages you want to use and what you want done with them, and click Save. Now the rule will be applied to your incoming messages and the messages will be filed automatically.

Setting Mail Preferences

You can set your preferences for working with Outlook Web App by clicking Options in the upper left corner of the Outlook Web App window and choosing See All Options. In the Mail Options window, click Settings, as shown in Figure 10-16.


Mail - Outlook Web App - Windows Internet Explorer
https://outlook.com/ecp/?rfr=owa
Bing
Favorites
Mail - Outlook Web App
Outlook Web App
sign out
Katherine Murray
Mail > Options: Manage Myself
My Mail
Account
Organize E-Mail
Groups
Settings
Phone
Block or Allow
Mail
Spelling
Calendar
General
Regional
E-Mail Signature
Tahoma
10
Save

Read Receipts

Choose how to respond to requests for read receipts.
● Ask me before sending a response
○ Always send a response
○ Never send a response

Reading Pane

Choose when items should be marked as Read.
○ Mark the item displayed in the Reading Pane as Read
Wait 5 seconds before marking the item as

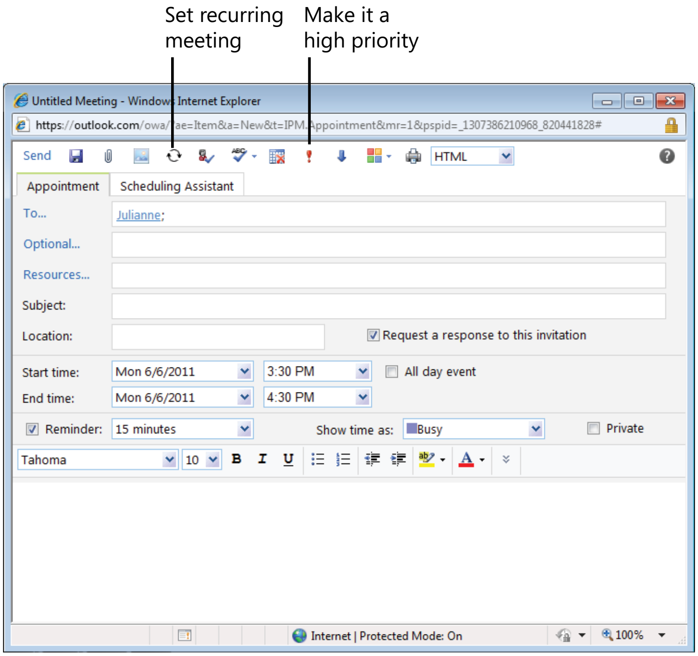
FIGURE 10-16 Click Settings to display and set your mail options.

On the Settings page, you can add an email signature, choose whether you want to receive receipts from the messages you send, whether you want messages you view in the Reading Pane to be marked as read, and how you want Outlook to handle displaying conversations. You can also scroll down to the Message Options at the bottom of the page to tell Outlook whether you want to hear a sound when new messages arrive, see notifications about new communications, and empty the Deleted Items Folder when you exit Outlook. Click Save to save the new settings you have entered.

Creating a Meeting Request

Chances are good that as you're organizing and leading your group, you're going to send out a fair number of meeting requests. Luckily, the process is super simple:

1. In Outlook Web App, click New.
2. Click Meeting Request.
3. In the Appointment tab of the New Meeting window, enter the email addresses of the recipients you want to invite. (See Figure 10-17.)


Set recurring meeting
Make it a high priority
Untitled Meeting - Windows Internet Explorer
Send
Appointment
Scheduling Assistant
Internet | Protected Mode: On
100%

https://outlook.com/owa/?ae=Item&a=New&t=IPM.Appointment&mr=1&pspid=_1307386210968_820441828#

HTML

To... Julianne;

Optional...

Resources...

Subject:

Location:

☑ Request a response to this invitation

Start time: Mon 6/6/2011 3:30 PM ☐ All day event

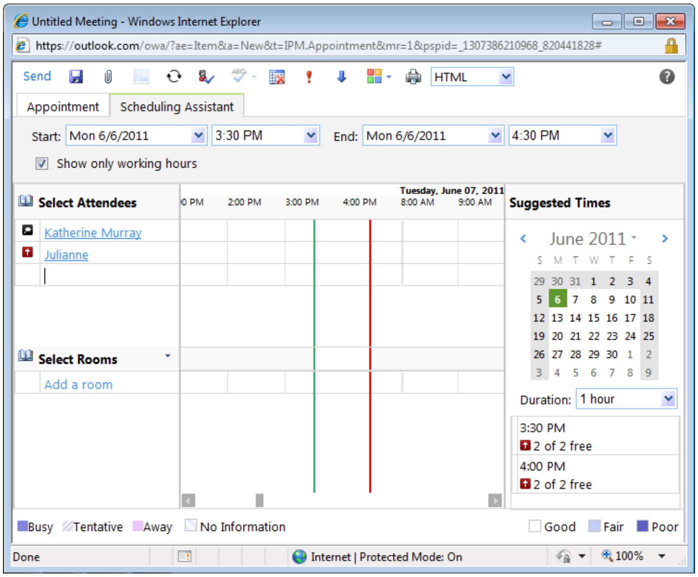
End time: Mon 6/6/2011 4:30 PM

☑ Reminder: 15 minutes Show time as: Busy ☐ Private

Tahoma 10

FIGURE 10-17 Create the invitation to send to recipients.

4. Enter a Subject line and a location.
5. Set the Start time and End time, and type the body of the invitation.
6. Click the Scheduling Assistant to schedule your meeting and set resources. (See Figure 10-18.)
7. Click Send to send the invitation.


Untitled Meeting - Windows Internet Explorer
Send
HTML
Appointment
Scheduling Assistant
Select Attendees
0 PM 2:00 PM 3:00 PM 4:00 PM
Tuesday, June 07, 2011
8:00 AM 9:00 AM
Suggested Times
June 2011
S M T W T F S
Select Rooms
Add a room
Busy
Tentative
Away
No Information
Good
Fair
Poor
Done
Internet | Protected Mode: On
100%

https://outlook.com/owa/?ae=Item&a=New&t=IPM.Appointment&mr=1&pspid=_1307386210968_820441828#

Start: Mon 6/6/2011 3:30 PM End: Mon 6/6/2011 4:30 PM

☑ Show only working hours

Katherine Murray

Julianne

Duration: 1 hour

3:30 PM
2 of 2 free

4:00 PM
2 of 2 free

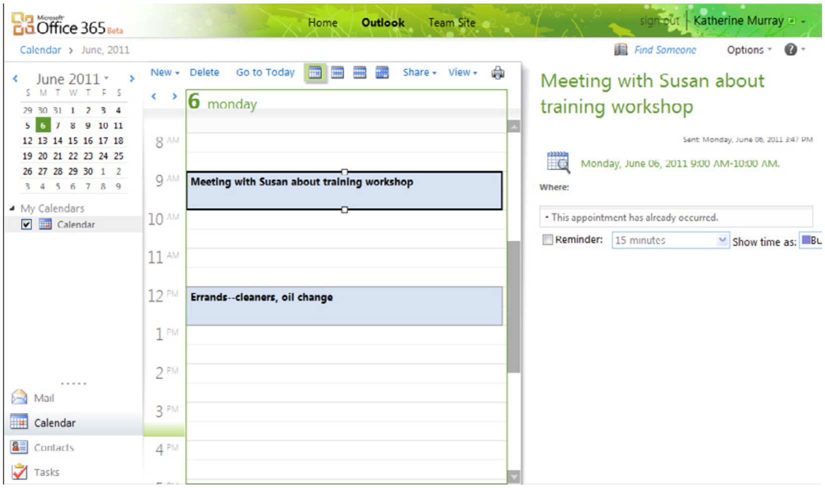
FIGURE 10-18 Use the Scheduling Assistant to check recipients' schedules and arrange for your meeting space if needed.

As you add recipients to the attendee list in the meeting invitation, the Scheduling Assistant will look up the schedule of each participant and let you know if the time is free for each person. If you find a schedule conflict, you can change the time on the invitation and try again.

Working with Your Calendar

One of the great things about Outlook Web App is that all the features are interrelated and you can easily move from your Inbox to your Calendar to your Task list with just a click of the mouse. When you want to view your calendar in Office 365, click Outlook to get to Outlook Web App, and then click Calendar in the bottom left area of the window.

The Calendar window likely looks familiar if you have used any of Microsoft's calendar tools available online or you've used Microsoft Outlook before. (See Figure 10-19.) In the upper left corner, you see a mini-calendar that shows you the current month at a glance. In the center of the window, you see today's schedule by default. On the right side of the window, you see details about the selected appointment.


Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Calendar > June, 2011
Find Someone
Options
June 2011
S M T W T F S
29 30 31 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 1 2
3 4 5 6 7 8 9
My Calendars
Calendar
Mail
Calendar
Contacts
Tasks
New
Delete
Go to Today
Share
View
6 monday
8 AM
9 AM
10 AM
11 AM
12 PM
1 PM
2 PM
3 PM
4 PM

Meeting with Susan about training workshop

Errands--cleaners, oil change

Meeting with Susan about training workshop

Sent: Monday, June 06, 2011 3:47 PM

Monday, June 06, 2011 9:00 AM-10:00 AM.

Where:

- This appointment has already occurred.

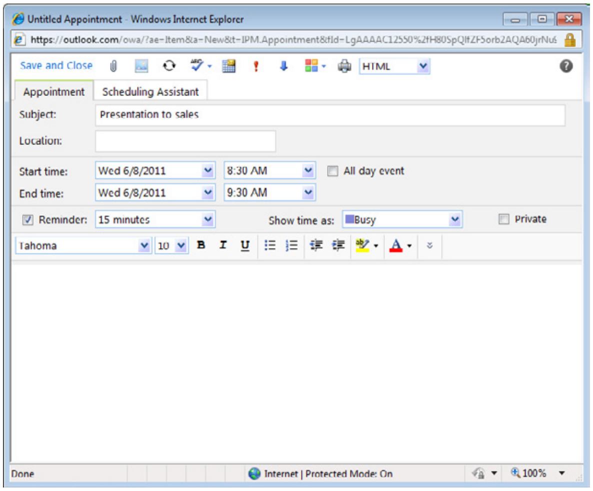
☐ Reminder: 15 minutes Show time as: Bu

FIGURE 10-19 The Calendar in Outlook Web App enables you to set, share, and modify appointments.

Adding an Appointment

When you want to add a new appointment to your calendar, display the date on which the appointment will occur by clicking the date in the calendar in the upper left corner of the screen.

In the schedule in the center of the window, scroll to the time at which the appointment will begin and double-click the timeslot. The New Appointment window opens as shown in Figure 10-20.


Untitled Appointment - Windows Internet Explorer
Save and Close
HTML
Appointment
Scheduling Assistant
Tahoma
10
B
I
U
Done
Internet | Protected Mode: On
100%

https://outlook.com/owa/?ae=Item&a=New&t=IPM.Appointment&fId=LgAAAAC12550%2fH80SpQIfZF5orb2AQA60jrNu

Subject: Presentation to sales

Location:

Start time: Wed 6/8/2011 8:30 AM ☐ All day event

End time: Wed 6/8/2011 9:30 AM

☑ Reminder: 15 minutes Show time as: Busy ☐ Private

FIGURE 10-20 You can easily create a new appointment by double-clicking the time slot on the calendar.

Enter information about the appointment, including the End time, the location, and any additional notes you want to include about resources you need, people you want to include, or files you want to share. Click the Scheduling Assistant to check the schedules of others in your group and create and send an invitation for others you want to attend.

When you're finished, click Save and Close, and the appointment is added to your calendar.

Changing Your Calendar View

Depending on when you want to schedule your appointment—and how you like to view the events you've arranged for the near future—you might want to change the daily view to Work Week view, Weekly view, or Monthly view.

You'll find the tools you need to change the calendar view in the top of the Schedule panel in the center of the Calendar view. (See Figure 10-21.) To change to a different view, simply click the icon of the view you'd like to see.

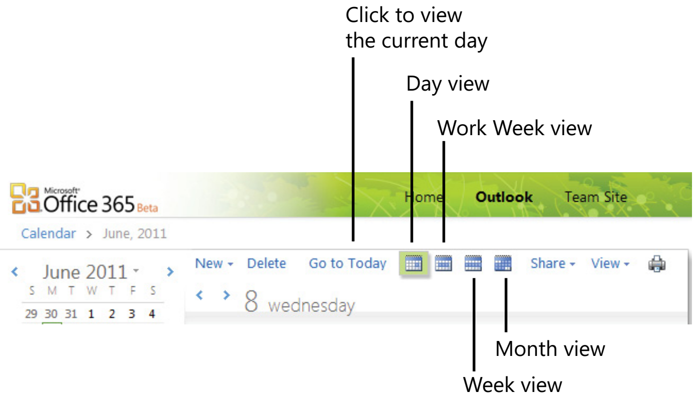

Click to view
the current day
Day view
Work Week view
Microsoft Office 365 Beta
Home
Outlook
Team Site
Calendar > June, 2011
June 2011
S M T W T F S
29 30 31 1 2 3 4
New
Delete
Go to Today
Share
View
8 wednesday
Month view
Week view

FIGURE 10-21 Click the View icon that reflects the way in which you want to view your calendar.

Tip

Sharing Your Calendar

When you're working in a team and creating new appointments and meeting requests that will include other members of your group, sharing your calendar is a good idea. You can easily share your Calendar in Outlook Web App by clicking Share and choosing Share This Calendar. (See Figure 10-22.)

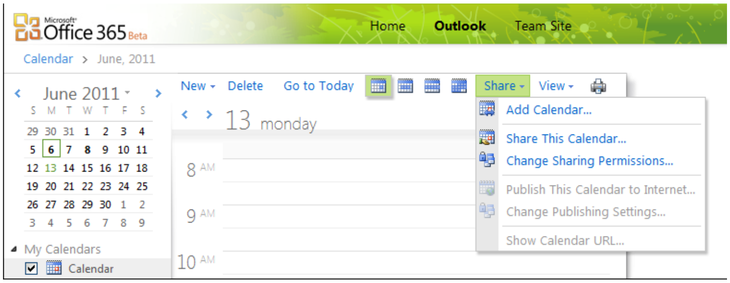
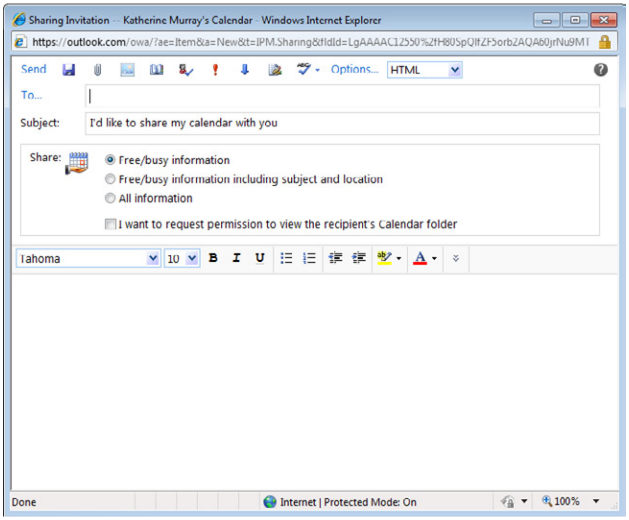

Microsoft Office 365 Beta
Home
Outlook
Team Site
Calendar > June, 2011
June 2011
S M T W T F S
29 30 31 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 1 2
3 4 5 6 7 8 9
My Calendars
Calendar
New
Delete
Go to Today
Share
View
13 monday
8 AM
9 AM
10 AM
Add Calendar...
Share This Calendar...
Change Sharing Permissions...
Publish This Calendar to Internet...
Change Publishing Settings...
Show Calendar URL...

FIGURE 10-22 Click the Share tool and choose Share This Calendar to begin sharing your Outlook calendar with your team.

The Sharing Invitation window appears so that you can send the message to others on your team with whom you want to share your calendar. (See Figure 10-23.) You can type the email addresses of your teammates in the To line, or click To and select your colleagues from the Address Book. In the Share area, click the way in which you'd like to share your information:

- **Free/busy information** enables those you invite to see your calendar in terms of when you are free and when you are busy.
- **Free/busy information including subject and location** gives others more information about your appointments, including where you'll be and what the topic of the meeting is about.
- **All information** enables others to see all details you've entered about the upcoming appointment.


Sharing Invitation -- Katherine Murray's Calendar - Windows Internet Explorer
https://outlook.com/owa/?ae=Item&a=New&t=IPM.Sharing&fId=LgAAAAC12550%2fH80SpQIfZF5orbZAQA60jrNu9MT
Send
Options...
HTML
To...
Tahoma
10
B
I
U
Done
Internet | Protected Mode: On
100%

Subject: I'd like to share my calendar with you

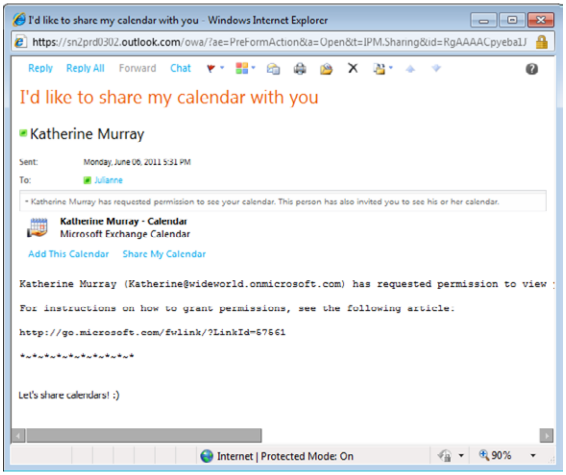
Share:
● Free/busy information
○ Free/busy information including subject and location
○ All information

☐ I want to request permission to view the recipient's Calendar folder

FIGURE 10-23 Send a sharing invitation to others on your team with whom you want to share your calendar.

If you want to ask whether you can have sharing access to your teammates' calendars, select the I Want To Request Permission To View The Recipient's Calendar Folder check box. Type any message you want to include in the body of the invitation, and click Send.

When the recipient receives the invitation, she will be able to add your calendar by clicking Add This Calendar, and if she wants to share her own calendar, she can do so by clicking the Share My Calendar link. (See Figure 10-24.)


I'd like to share my calendar with you - Windows Internet Explorer
https://sn2prd0302.outlook.com/owa/?ae=PreFormAction&a=Open&t=IPM.Sharing&id=RgAAAACpyebalJ
Reply
Reply All
Forward
Chat
Add This Calendar
Share My Calendar
Internet | Protected Mode: On
90%

I'd like to share my calendar with you

Katherine Murray

Sent: Monday, June 06, 2011 5:31 PM
To: Julianne

- Katherine Murray has requested permission to see your calendar. This person has also invited you to see his or her calendar.

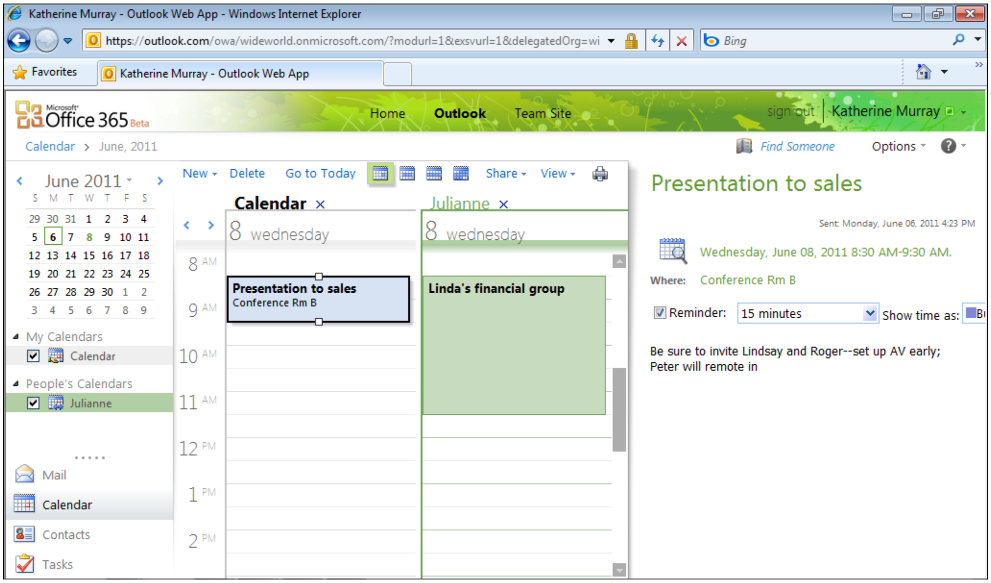
Katherine Murray - Calendar
Microsoft Exchange Calendar

```
Katherine Murray (Katherine@wideworld.onmicrosoft.com) has requested permission to view

For instructions on how to grant permissions, see the following article:

http://go.microsoft.com/fwlink/?LinkId=57561

*~*~*~*~*~*~*~*~*~*
```

Let's share calendars! :)

FIGURE 10-24 The recipient of the sharing invitation can click Add This Calendar to share your calendar and Share My Calendar if she wants to return the favor.

After your calendars are shared, you will be able to view the calendars of others alongside your own, which will help the team find times when everyone can meet. To display another person's shared calendar, simply select the check box in the People's Calendars area of Calendar view. (See Figure 10-25.) You can hide the shared calendars again by simply clicking the check box again to remove the check mark.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?modurl=1&exsvurl=1&delegatedOrg=wi
Bing
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Calendar > June, 2011
Find Someone
Options
June 2011
S M T W T F S
29 30 31 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 1 2
3 4 5 6 7 8 9
My Calendars
Calendar
People's Calendars
Julianne
Mail
Calendar
Contacts
Tasks
New
Delete
Go to Today
Share
View
Calendar ×
Julianne ×
8 wednesday
8 wednesday
8 AM
9 AM
10 AM
11 AM
12 PM
1 PM
2 PM
Presentation to sales
Conference Rm B
Linda's financial group

Presentation to sales

Sent Monday, June 06, 2011 4:23 PM

Wednesday, June 08, 2011 8:30 AM-9:30 AM.

Where: Conference Rm B

☑ Reminder: 15 minutes Show time as: Bu

Be sure to invite Lindsay and Roger--set up AV early;
Peter will remote in

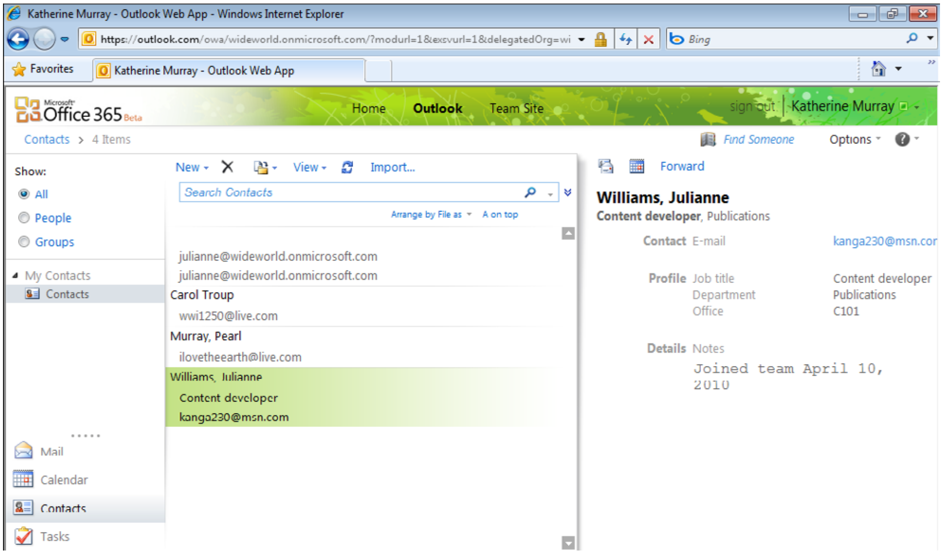
FIGURE 10-25 You can view calendars side by side after calendars are shared.

Tip

Tip

Importing and Managing Your Contacts

You can easily add, manage, organize, and create subgroups of your contacts by working in the Contacts area of Outlook Web App. When you first click Contacts in the lower left corner of the Outlook Web App window, you see a list of all contacts displayed in the center of the screen. (See Figure 10-26.) The right-most panel shows you the details related to the contact selected in the contact list.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?modurl=1&exsvurl=1&delegatedOrg=wi
Bing
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Contacts > 4 Items
Find Someone
Options
Show:
All
People
Groups
My Contacts
Contacts
New
View
Import...
Search Contacts
Arrange by File as
A on top
Forward
Mail
Calendar
Contacts
Tasks

julianne@wideworld.onmicrosoft.com
julianne@wideworld.onmicrosoft.com
Carol Troup
wwi1250@live.com
Murray, Pearl
ilovetheearth@live.com
Williams, Julianne
Content developer
kanga230@msn.com

Williams, Julianne
Content developer, Publications
Contact E-mail kanga230@msn.cor
Profile Job title Content developer
Department Publications
Office C101
Details Notes
Joined team April 10, 2010

FIGURE 10-26 Click Contacts to display the Outlook Web App contact manager.

Adding New Contacts

The easiest way to add a new contact in Outlook Web App is to click New at the top of the Contacts list and choose Contact. (See Figure 10-27.)

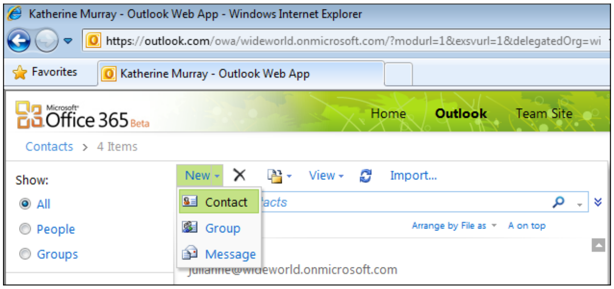
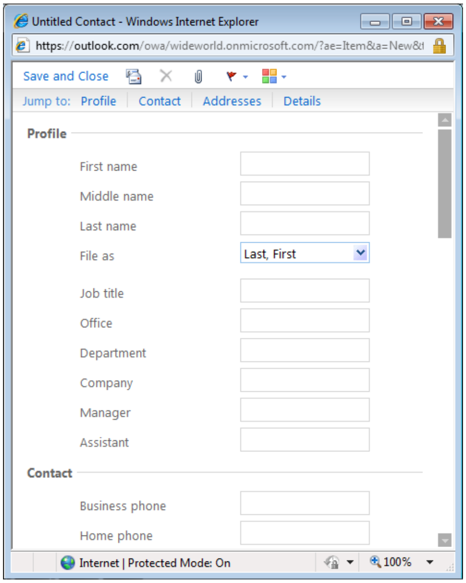

Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?modurl=1&exsvurl=1&delegatedOrg=wi
Favorites
Katherine Murray - Outlook Web App
Microsoft Office 365 Beta
Home
Outlook
Team Site
Contacts > 4 Items
Show:
All
People
Groups
New
View
Import...
Contact
Group
Message
acts
Arrange by File as
A on top
julianne@wideworld.onmicrosoft.com

FIGURE 10-27 Add a new contact by clicking New and choosing Contact.

Outlook opens a new contact window so that you can fill in all the information you have for the new contact. Scroll down the page to find additional fields, or click the various category names (Profile, Contact, Addresses, and Details) to move to different areas of the form. (See Figure 10-28.)


Untitled Contact - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?ae=Item&a=New&t
Save and Close
Jump to: Profile | Contact | Addresses | Details
Profile
First name
Middle name
Last name
Job title
Office
Department
Company
Manager
Assistant
Contact
Business phone
Home phone
Internet | Protected Mode: On
100%

File as: Last, First

FIGURE 10-28 Enter information about your new contact as completely as you can.

You don't need to enter information in all the fields on the new contact form. You can simply enter a name and an email address for starters, if that's all you have. At a later point, you can open the contact window (by double-clicking the contact name in the Contacts window) and add to the information you originally entered or change that information.

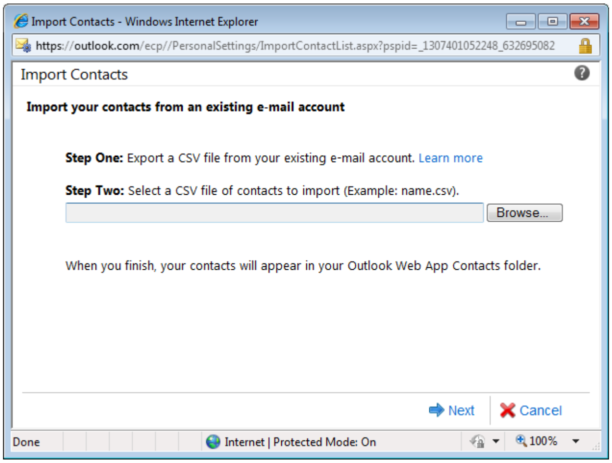
Importing Contacts

Outlook Web App includes a tool that makes it simple to add whole contact lists if you like, which makes it convenient to add a company list, a department roster, or a mailing list to your contacts online.

To import contacts into Outlook Web App, follow these steps:

1. Click Import in Contacts view.
2. In the Import Contacts window, click Browse. (See Figure 10-29.)

3. Navigate to the folder containing the data file you want to import, and click Open.
4. Click Next.
5. In the Congratulations page, click Finish.


Import Contacts - Windows Internet Explorer
https://outlook.com/ecp//PersonalSettings/ImportContactList.aspx?pspid=_1307401052248_632695082
Import Contacts
Browse...
Next
Cancel
Done
Internet | Protected Mode: On
100%

Import your contacts from an existing e-mail account

Step One: Export a CSV file from your existing e-mail account. Learn more

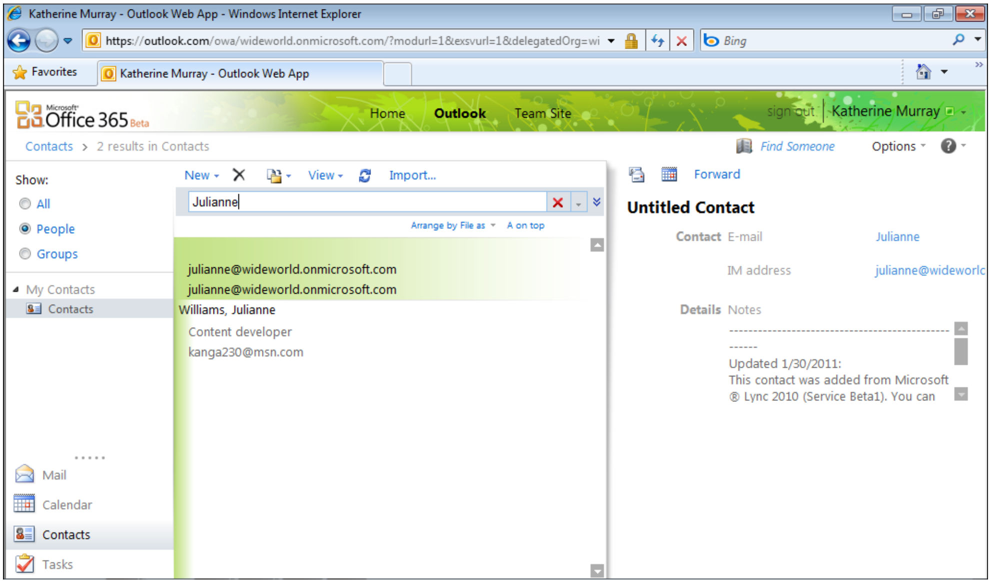
Step Two: Select a CSV file of contacts to import (Example: name.csv).

When you finish, your contacts will appear in your Outlook Web App Contacts folder.

FIGURE 10-29 Click Browse to navigate to the CSV file you want to import.

Searching for a Contact

Now that you have dozens of contacts in your Contacts list, you need an easy way of finding just the person you need at any specific time. To find a contact in Outlook Web App, click in the Search box and type the name of the person you want to find. Click the Search tool, and Outlook begins searching. After a few seconds (depending on the size of your contacts list), any results of the search are shown in the contact list. (See Figure 10-30.) You can clear the contact results list and return to the normal contacts display by clicking the close box at the right end of the search box.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/wideworld.onmicrosoft.com/?modurl=1&exsvurl=1&delegatedOrg=wi
Bing
Favorites
Katherine Murray - Outlook Web App
Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Contacts > 2 results in Contacts
Find Someone
Options
Show:
All
People
Groups
My Contacts
Contacts
New
View
Import...
Forward
Arrange by File as
A on top
Mail
Calendar
Contacts
Tasks

Julianne

julianne@wideworld.onmicrosoft.com
julianne@wideworld.onmicrosoft.com
Williams, Julianne
Content developer
kanga230@msn.com

Untitled Contact

Contact E-mail Julianne
IM address julianne@wideworlc

Details Notes

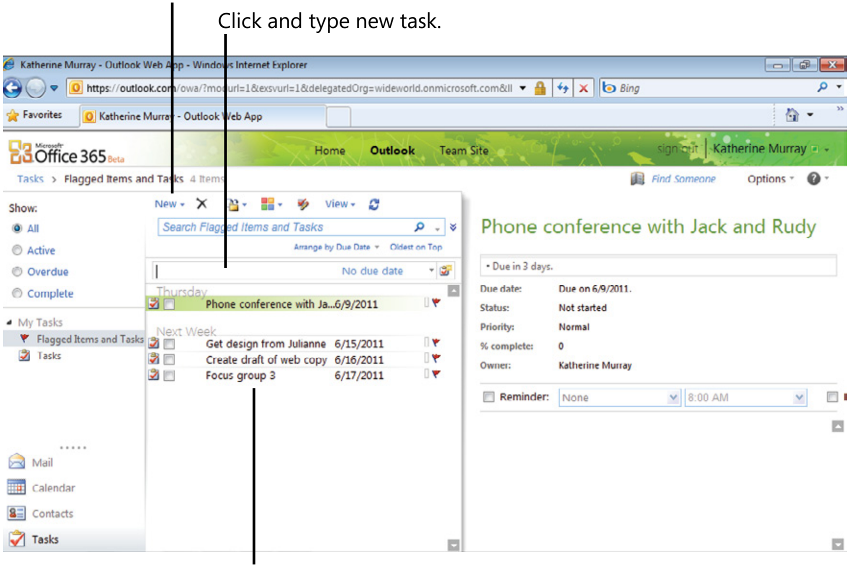
Updated 1/30/2011:
This contact was added from Microsoft
® Lync 2010 (Service Beta1). You can

FIGURE 10-30 Outlook makes it easy for you to locate a specific contact no matter how long your list might be.

Adding and Completing Tasks

The final tool in Outlook Web App to explore in this chapter is one you can use to create and manage tasks that relate to your Office 365 projects. Click the Tasks tool in the lower left corner of the Outlook window. (See Figure 10-31.) You can create a new task two different ways:

- Click New, and click Task to display the New Task window.
- Click in the Type A New Task box, and enter the information—text and date—that you want to include.


Katherine Murray - Outlook Web App - Windows Internet Explorer
https://outlook.com/owa/?modurl=1&exsvurl=1&delegatedOrg=wideworld.onmicrosoft.com&ll
Bing
Favorites
Katherine Murray - Outlook Web App
Office 365 Beta
Home
Outlook
Team Site
sign out
Katherine Murray
Tasks > Flagged Items and Tasks 4 Items
Find Someone
Options
Show:
All
Active
Overdue
Complete
My Tasks
Flagged Items and Tasks
Tasks
Mail
Calendar
Contacts
Tasks
New
View
Search Flagged Items and Tasks
Arrange by Due Date
Oldest on Top
No due date
Thursday
Next Week

Phone conference with Ja...	6/9/2011
Get design from Julianne	6/15/2011
Create draft of web copy	6/16/2011
Focus group 3	6/17/2011

Phone conference with Jack and Rudy

• Due in 3 days.

Due date:	Due on 6/9/2011.
Status:	Not started
Priority:	Normal
% complete:	0
Owner:	Katherine Murray

☐ Reminder: None 8:00 AM

Click and display the New Task window.

Click and type new task.

Double-click to display and edit task.

FIGURE 10-31 Options for adding new tasks or making changes to existing ones.

After you add the task, you can easily sort, categorize, edit, or delete tasks. You can mark a task as complete by selecting the task's check box and then clicking Mark Complete in the tools row just above the search box. Outlook shows the task as completed and adds strikethrough to the text of the task. The icon on the far right of the tasks now shows a checkmark, indicating that the task has been completed.

Tip

What's Next

In this chapter, you found out how to use Outlook Web App to work with email, manage your messages, and set email preferences. You also learned how to work with calendars and tasks. In the next chapter, you learn how to use Microsoft Lync to stay in touch with your team in real time.

CHAPTER 11

Talking It Over with Microsoft Lync

IN THIS CHAPTER:

- Introducing Microsoft Lync
- Working with contacts in Lync
- Instant messaging with your team
- Making a call with Lync
- Sharing programs and files

IMAGINE WORK with no limits. You can have a great two-day training without flying your team to a central location. You can share the latest reports without sending them through the mail, show images from submitted portfolios, or walk through the sales projections by viewing them on a whiteboard.

What's more, you can show everybody—right now, in real time—what you're working with on your desktop. You can tweak a presentation together. You can talk things through. Good ideas happen that way.

And when your work is done, you can simply close the conversation and go back to what you were doing before the meeting began. No fuss, no bother.

And that's just a part of what Microsoft Lync 2010 can do for you and your team.

This chapter introduces you to Microsoft Lync 2010, the instant messaging and online meeting tool that is part of Office 365. You'll find out how to set up Lync to work the way you want it to, add contacts, have instant messaging conversations and phone calls, add video, share files, and much more.

WHERE DID LYNC COME FROM?

Microsoft Lync was formerly called Microsoft Office Communicator 2007 R2, and it was previously available only for corporate clients as part of the enterprise packaging for Office Professional Plus 2010. With Office 365, Microsoft Lync is available for both Small Business and Enterprise customers. Microsoft Lync enables Office 365 users to

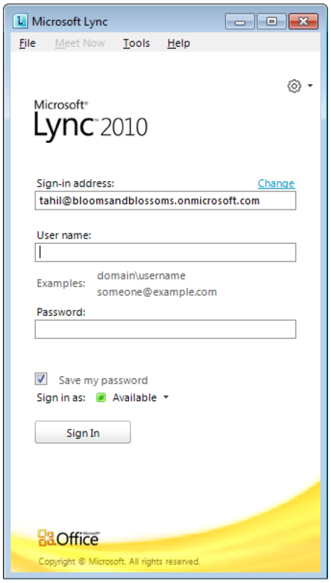
- See the online status of other team members.
- Connect with colleagues through instant messaging.
- Make audio or video calls.
- Host online meetings.
- Share and transfer files.
- Record your audio and video calls.
- Set up dial-in conferencing.
- Share your desktop.
- Use a whiteboard.
- Save notes to your OneNote notebook.

Introducing Microsoft Lync

In Chapter 2, "Getting Started with Office 365," you downloaded and installed Microsoft Lync. To start Microsoft Lync (if it doesn't start automatically when you log on to your computer), click the Windows 7 Start button and click All Programs. Navigate to the Microsoft Lync folder, and click it; then click the Microsoft Lync 2010 program icon.

Signing In to Lync

The Microsoft Lync Sign In window appears so that you can enter your Office 365 user ID and password. The first time you sign in, the Microsoft Lync Sign In window asks you to enter your user name and password. (See Figure 11-1.) You can select the Save My Password check box to have Lync remember your password on your current computer.



Microsoft Lync
File
Meet Now
Tools
Help
Microsoft
Lync 2010
Change
Examples:
domain\username
someone@example.com
Sign In
Office
Copyright © Microsoft. All rights reserved.

Sign-in address: tahil@bloomsandblossoms.onmicrosoft.com

User name:

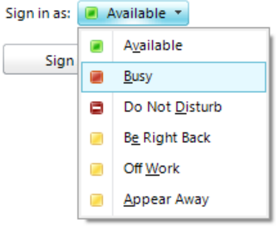
Password:

☑ Save my password

Sign in as: Available

FIGURE 11-1 Enter your Office 365 user name and password, and click Sign In.

To the right of the Sign In As selector, you'll see a small green box. This is the *presence indicator*, and it lets others on your team know whether you are available for online contact. You can choose from a number of presence settings by clicking the arrow to the right of the indicator, which causes the following list to appear:



Sign
Available
Busy
Do Not Disturb
Be Right Back
Off Work
Appear Away

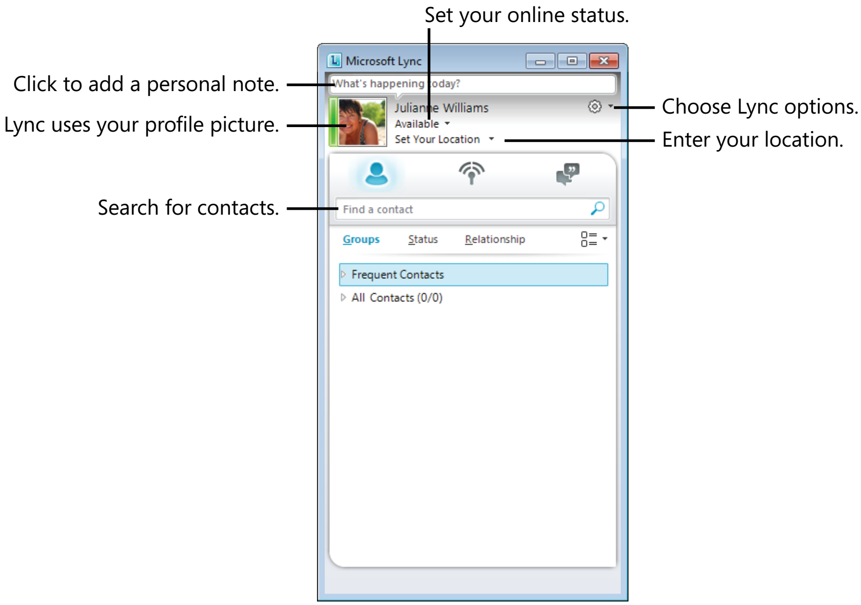
Sign in as: Available

After you make your selection, click Sign In to launch Lync 2010. The program contacts the server and authenticates your account, and then the Microsoft Lync 2010 window appears.

Getting Started with Lync

The Lync 2010 window pops up on your desktop, taking up only a portion of your screen. This design makes it easy for you to have other windows open on-screen while you're communicating with your colleagues in Lync. (See Figure 11-2.) You can do a number of things right away in Lync (and you'll learn more about these tasks in the following sections):

- Add a personal note to tell others what you're doing.
- Change your profile picture.
- Search for contacts you want to add to Lync.
- Launch a phone call, instant messaging (IM) session, video chat, or meeting.
- Set your online status and presence indicator.
- Enter your location.


Microsoft Lync
What's happening today?
Julianne Williams
Available
Set Your Location
Find a contact
Groups
Status
Relationship
Frequent Contacts
All Contacts (0/0)

Set your online status.

Click to add a personal note.

Lync uses your profile picture.

Choose Lync options.

Enter your location.

Search for contacts.

FIGURE 11-2 The Lync window offers various tools for interacting with your team in real time.

Entering a Personal Note

You can click in the What's Happening Today? area at the top of the Lync window and type a phrase about what you're working on, how your day is going, or just about anything else that strikes your fancy. The personal note in Lync is like a status update in Facebook; it lets your teammates keep up with what's going on in your world.

Simply click in the box and type the phrase you want to share; then press Enter. When your colleagues view your contact info in Lync on their own computers, they will see your note beside your photo. They can also get an update on your added notes by clicking the Activity Feed tool at the top of the contacts list in the Lync window. You can update your personal note as many times as you like throughout the day.

Tip

Setting Your Location

Setting your location might not seem like that big a deal if your entire team works in the same state, but when you're sharing files and tasks with people all over the world, knowing the time difference of each person's location helps you coordinate schedules and arrange meetings when it's convenient for everyone.

Click Set Your Location and a text box appears so that you can type your location. You can then click the Location arrow to see additional options, which enable you to turn off the display of your location and remove custom locations. (See Figure 11-3.)

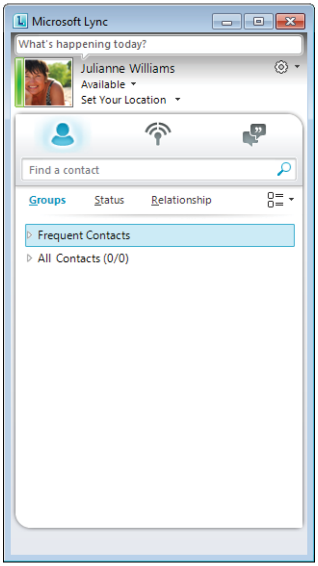

Microsoft Lync
What's happening today?
Julianne Williams
Available
Set Your Location
Find a contact
Groups
Status
Relationship
Frequent Contacts
All Contacts (0/0)

FIGURE 11-3 Click and type your location in the Location field; then click the arrow to change Location options.

If you're an administrator, you can set Location information by editing the settings available for each information user. Click Admin and then choose Users. Click the name of the user whose account you want to change, and then click Settings. Click the arrow in the Set User Location setting, and click the location you want to assign to the user.

Setting Up Sound and Voice

Lync includes a friendly setup wizard that walks you through the process of entering your information and setting up your version of Lync so that you can speak, hear, and see others in your online meetings and conversations. To launch the wizard, click the Options button in the upper right corner of the Lync window, click File, click Help, and follow the prompts on the screen until you get to the Microsoft Lync 2010 welcome page to launch the wizard. (See Figure 11-4.)

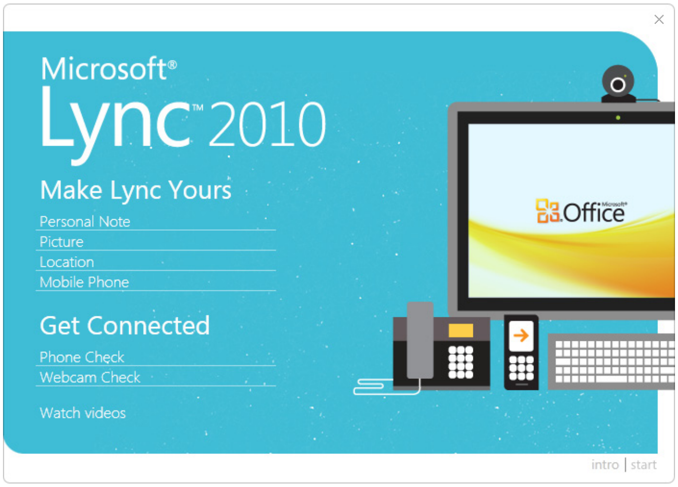


FIGURE 11-4 Clicking Start on this page launches the Welcome To Lync Wizard, which walks you through the process of setting up your computer for online meetings.

Click Start in the lower right corner to begin the wizard. The utility explains the personal note, picture, and location area, and it gives you the chance to enter your mobile phone number so that you can get Lync calls on your phone. Click in the mobile phone box, and type your number; then click outside the box to close it.

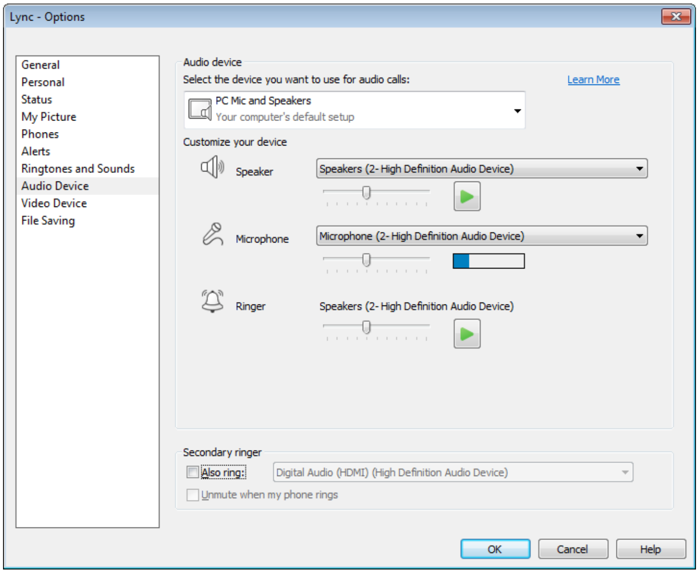
If you haven't already done so, plug in your headset or connect your speakers and microphone. Then click Get Connected, and Lync searches for the audio capability on your system. When Lync finds your audio devices, you will see the message, "You can use your computer's mic and speakers for calls."

If you have a webcam connected to your computer, you can make sure it is working properly with Lync by clicking Webcam Check. The wizard checks your webcam to make sure it's working properly; you'll be able to see the live video in the display your screen. Click Next, and then click Exit to close the wizard and return to the Lync window.

CHOOSING ADVANCED AUDIO SETTINGS

There's another way you can fine-tune your audio settings for Lync. Click the Options button in the upper right corner of the Lync window, and click Tools and then Options. In the Lync Options dialog box, click Audio Device.

On this screen, you can choose the device you want to use for calls, and choose the devices and sound levels you prefer for your speakers, microphone, and ringer.


Lync - Options
General
Personal
Status
My Picture
Phones
Alerts
Ringtones and Sounds
Audio Device
Video Device
File Saving
Learn More
OK
Cancel
Help

Audio device

Select the device you want to use for audio calls:

PC Mic and Speakers
Your computer's default setup

Customize your device

Speaker: Speakers (2- High Definition Audio Device)

Microphone: Microphone (2- High Definition Audio Device)

Ringer: Speakers (2- High Definition Audio Device)

Secondary ringer

☐ Also ring: Digital Audio (HDMI) (High Definition Audio Device)

☐ Unmute when my phone rings

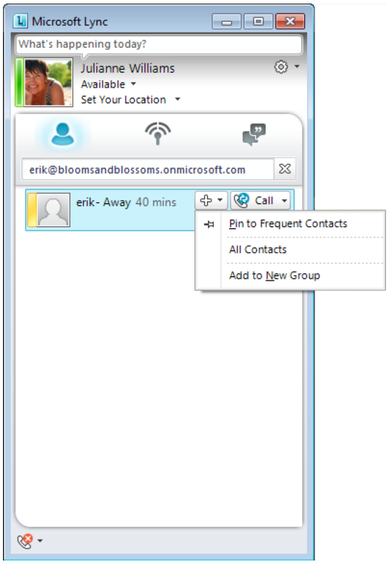
Click your choices, and then click OK to save your settings.

Tip

Working with Contacts in Lync

After you finish entering your information and checking audio and video connections, your next step is to add contacts to Lync. You might have already added user accounts to Office 365, so adding those contacts to Lync is as simple as searching for the contact names you want to add and pinning them to your contacts list. Here are the steps:

1. Sign in to Lync if you're not logged in automatically.
2. In the Microsoft Lync window, click in the Search box.
3. Type the email address of the contact you want to add, and press Enter.
4. Click the Add To Contacts button. (See Figure 11-5.)
5. Click Pin To Frequent Contacts or All Contacts to choose where the contact will be added.


Microsoft Lync
What's happening today?
Julianne Williams
Available
Set Your Location
erik- Away 40 mins
Call
Pin to Frequent Contacts
All Contacts
Add to New Group

erik@bloomsandblossoms.onmicrosoft.com

FIGURE 11-5 When you type the email address of the contact, Lync searches for the contact name and adds it to the contact list.

SO HOW DO EXTERNAL COMMUNICATIONS WORK?

By default, Lync is set up to allow external communications, which means that you and your teammates will be able to use Lync to communicate with people outside your Office 365 team.

For using public instant messaging with people outside of your Office 365 approved contacts, however, Windows Live Messenger is the software that is used. You can also set up audio and video calls with external contacts, but again, Windows Live Messenger supports the calls. Audio and video conferences and desktop sharing are not available when you're working with external contacts.

Creating a Contact Group

You can create a group of contacts if you want to organize your team for a specific project or task; or you might group all users who are in a certain location or working with a particular program. After you create a group, you can communicate with all members of that group at once, for example, by sending a group email to the whole team about an upcoming meeting or event. You can create a new contact group when you add a contact to Lync, or you can create a group and then add contacts to it as you go along. To create a group with your existing users, follow these steps:

1. Click in the search box, and enter the email address of the user you want to add.
2. Click the Add To Contacts button, and click Add To New Group.

   Lync creates a new group and selects the group name. The new user is displayed in the group. (See Figure 11-6.)
3. Type the name you want to use for the new group, and press Enter.

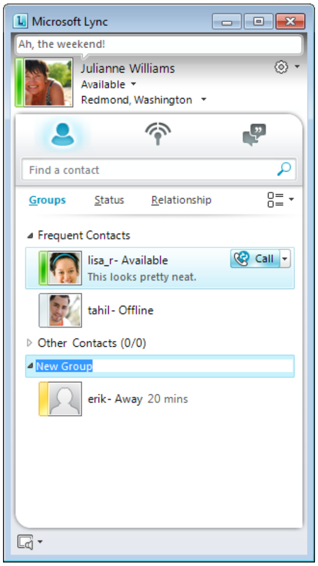

Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Find a contact
Groups
Status
Relationship
Frequent Contacts
lisa_r- Available
This looks pretty neat.
Call
tahil- Offline
Other Contacts (0/0)
New Group
erik- Away 20 mins

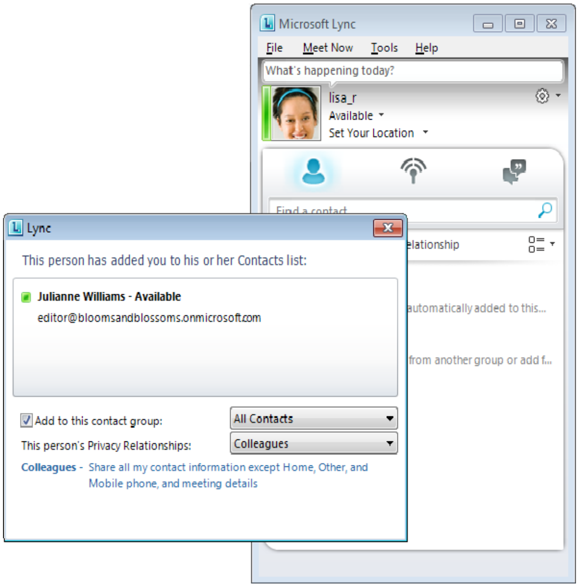
FIGURE 11-6 Click Add To New Group to create a new contact group in the Lync window.

To create a new group that you will add contacts to later, right-click Frequent Contacts and select Create New Group. Enter a name for the new group, and press Enter. You can then drag and drop contacts into the new group when you're ready to add members to it.

You can include contacts in more than one group if you like, and you can also rearrange the groups in the Lync window by simply dragging and dropping a selected group to a new position in the list.

Accepting a Contact Request

When you add a new contact to your list, a contact request is sent to the person you're adding. Similarly, when others add you to *their* contact list, you receive a message asking your permission to be added to their list. The Lync message box alerting you to this appears on your desktop if you are online; if you're not using Lync when someone adds you to her list, the message will pop up the next time you log in. (See Figure 11-7.)


Microsoft Lync
File
Meet Now
Tools
Help
What's happening today?
lisa_r
Available
Set Your Location
Find a contact
elationship
automatically added to this...
from another group or add f...
Lync

This person has added you to his or her Contacts list:

Julianne Williams - Available
editor@bloomsandblossoms.onmicrosoft.com

☑ Add to this contact group: All Contacts

This person's Privacy Relationships: Colleagues

Colleagues - Share all my contact information except Home, Other, and Mobile phone, and meeting details

FIGURE 11-7 When another person adds you to her Contacts list, you receive a notification you can use to add that person to your list as well.

If you want to add the person to your own Contacts list, click the Add To This Contact Group check box and click the All Contacts arrow on the right side of the message box. Choose the group to which you want to assign the new contact. Additionally, you can choose the privacy relationship you want to apply to this contact by clicking the arrow to the right of Colleagues and choosing the level you want to set for that person. (Read on for more about setting privacy relationships in Lync.)

Setting Privacy Levels for Contact Relationships

No matter how many contacts you add to Lync, you can tailor each contact so that it allows others to see just the amount of information you want them to see. Lync allows you to choose from among five different privacy settings:

- **Friends And Family** This setting gives others the most information about you, enabling them to see all your contact information and viewing any items you include in your profile (such as picture, email address, and more). Friends and family cannot see your meeting details, however.
- **Workgroup** This setting is designed for the team you work with on a regular basis. Contacts you assign this privacy setting to can see all your contact information but won't be able to view your Home and Other phone numbers. This setting also enables others to contact you even if you have your Lync status set to Do Not Disturb.
- **Colleagues** Contacts assigned these privacy settings can see all your contact information but cannot view your Home, Other, and Mobile phone numbers. Additionally, contacts designated as Colleagues will not be able to view your meeting details.
- **External Contacts** This setting shows others only your name, title, email address, company, and picture.
- **Blocks Contacts** Contacts with this setting can see only your presence in Lync—your name and email address—but they will be unable to contact you through Lync. To communicate with you, people you designate as Blocked Contacts will need to send you an email message.

By default, Lync sets up all new contacts with the Colleagues setting. As you saw in the previous section, when someone adds you to his or her Contacts list, you receive a notification, and you can set the privacy level for your relationship when you add that person to your own Contacts list.

You can also change the privacy setting for any of your contacts. In the Lync window, right-click the contact you want to change and point to Change Privacy Relationship. A list of available privacy settings appears, and the current level is highlighted. (See Figure 11-8.) Simply click the new level you want to apply or, if you want to return the contact to the Lync default settings, click Auto-Assign Relationship.

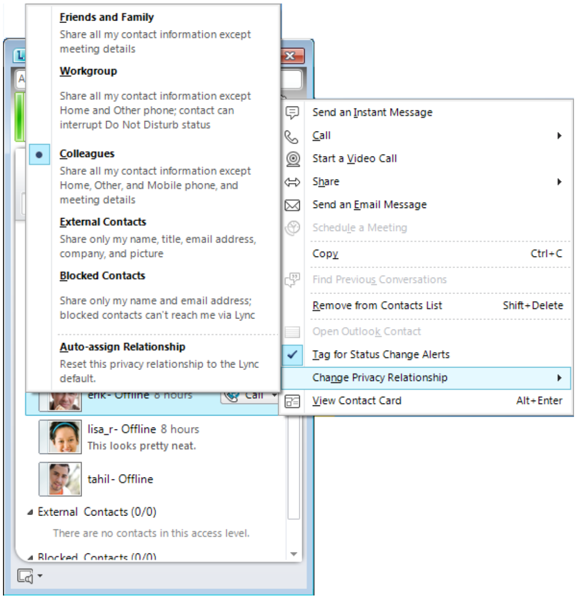

Friends and Family
Share all my contact information except meeting details
Workgroup
Share all my contact information except Home and Other phone; contact can interrupt Do Not Disturb status
Colleagues
Share all my contact information except Home, Other, and Mobile phone, and meeting details
External Contacts
Share only my name, title, email address, company, and picture
Blocked Contacts
Share only my name and email address; blocked contacts can't reach me via Lync
Auto-assign Relationship
Reset this privacy relationship to the Lync default.
Send an Instant Message
Call
Start a Video Call
Share
Send an Email Message
Schedule a Meeting
Copy Ctrl+C
Find Previous Conversations
Remove from Contacts List Shift+Delete
Open Outlook Contact
Tag for Status Change Alerts
Change Privacy Relationship
View Contact Card Alt+Enter
erik - Offline 8 hours
Call
lisa_r- Offline 8 hours
This looks pretty neat.
tahil - Offline
External Contacts (0/0)
There are no contacts in this access level.
Blocked Contacts (0/0)

FIGURE 11-8 You can change the amount of information your contacts can see about you by choosing a different privacy setting.

Tagging Contacts

When you're working closely with others—especially if you're working at a distance from them—it can sometimes be helpful to know when people are available online and when they're not. Suppose you're working on finalizing a contract, but you really need the input of a manager who is working overseas. You can tag his contact to let Lync know you want to be alerted when he logs into Lync the next time so that you can ask him questions as you finalize your contract. Here's how to do that:

1. In the Lync window, right-click the contact you want to change.
2. Click Tag For Status Change Alerts. (See Figure 11-9.)

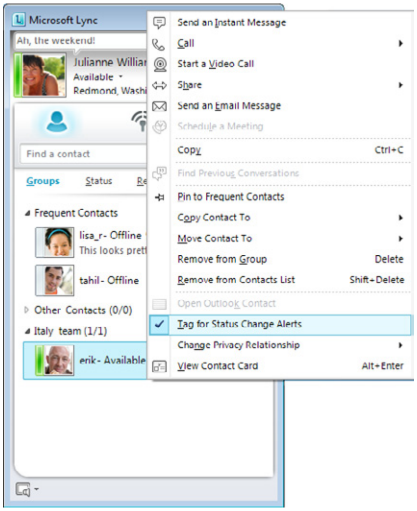

Microsoft Lync
Ah, the weekend!
Julianne Willian
Available
Redmond, Washi
Find a contact
Groups
Status
Frequent Contacts
lisa_r- Offline
This looks prett
tahil- Offline
Other Contacts (0/0)
Italy team (1/1)
erik- Available
Send an Instant Message
Call
Start a Video Call
Share
Send an Email Message
Schedule a Meeting
Copy Ctrl+C
Find Previous Conversations
Pin to Frequent Contacts
Copy Contact To
Move Contact To
Remove from Group Delete
Remove from Contacts List Shift+Delete
Open Outlook Contact
Tag for Status Change Alerts
Change Privacy Relationship
View Contact Card Alt+Enter

FIGURE 11-9 You can tag individual contacts so that you are notified when their online status changes.

The next time the contact signs in to Lync, an alert will appear on your desktop, letting you know the contact is now available online. (See Figure 11-10.) Similarly, when the contact's status changes—to Away, Busy, or any of the other status settings—an alert will let you know.

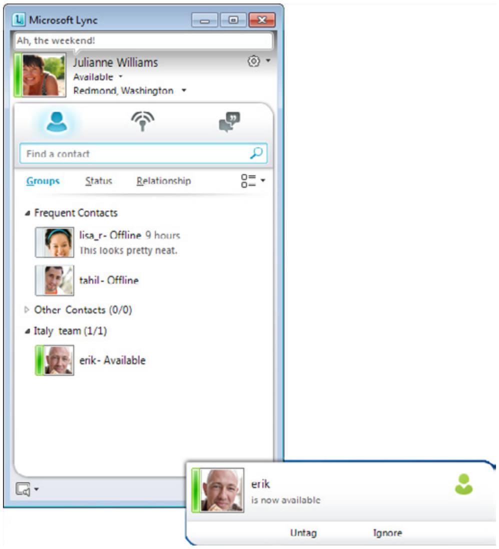
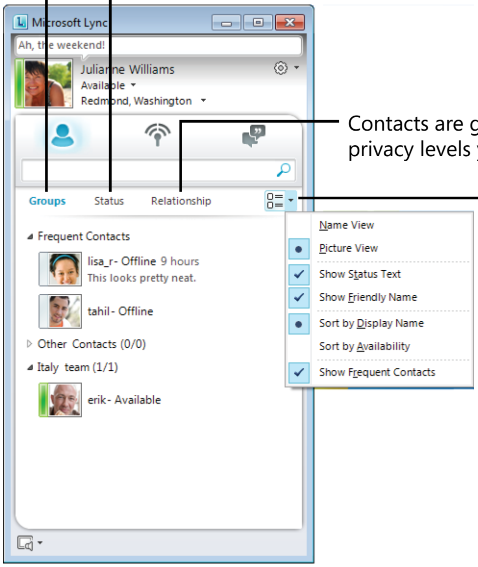

Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Find a contact
Groups
Status
Relationship
Frequent Contacts
lisa_r- Offline 9 hours
This looks pretty neat.
tahil- Offline
Other Contacts (0/0)
Italy team (1/1)
erik- Available
erik
is now available
Untag
Ignore

FIGURE 11-10 After you tag a contact so that you receive alerts, Lync lets you know when the contact's status changes.

Tip

Changing Contact Views

By default, your contacts in the Lync window appear organized by group, but as you can see from the selections at the top of the list, you can change the view to display your contacts arranged by online status or by relationship. The Display Options on the right side of the views row gives you options for changing the way contact information is organized in the current view. (See Figure 11-11.)


Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Groups
Status
Relationship
Frequent Contacts
lisa_r- Offline 9 hours
This looks pretty neat.
tahil- Offline
Other Contacts (0/0)
Italy team (1/1)
erik- Available
Name View
● Picture View
✓ Show Status Text
✓ Show Friendly Name
● Sort by Display Name
Sort by Availability
✓ Show Frequent Contacts

Contacts are organized by the groups they are assigned to.

Contacts are displayed according to their online status.

Contacts are grouped by the privacy levels you have assigned to them.

Click to choose display options

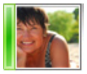
FIGURE 11-11 You can display your contacts in different ways by clicking the view tool you want to use and choosing View Options.

To change the way your contacts appear in the list, click the view you want to use (Groups, Status, or Relationship.) The list is immediately rearranged according to your selection. You can further tailor the information shown for your contacts by clicking the Display Options tool and clicking the items in the list you want to display. To remove any of the existing items, simply click it. The highlight is removed from the item, and that piece of information is hidden from view.

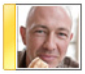
Working with Presence and Contact Cards

Your presence will be visible to all others on your team—and the presence of others will be visible to you. Others will also be able to see your presence indicator in Outlook Web App and when you're working collaboratively on documents in Microsoft Word, PowerPoint, and Excel. You can change your presence at any point in Office 365 where you can see the presence indicator.

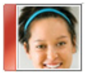
So what do the colors mean? Here's a quick list:



A **green** presence indicator means that the contact is online and available, and all contact methods through Lync are available to you.



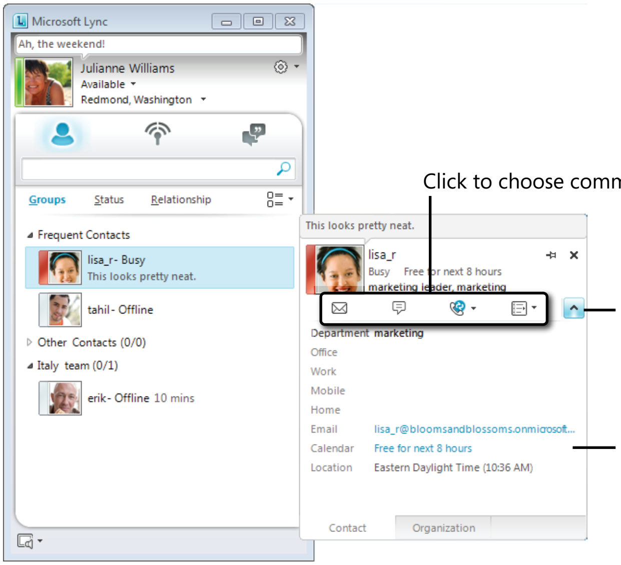
A **yellow** presence indicator means that the person is away from his desk or unavailable at the moment. Limited communications methods will be available through Lync.



A **red** presence indicator means that the person is online but is currently unavailable, either because she is busy or has set Do Not Disturb as the selected status. Limited communication options will be available to you when you see this presence indicator.

The presence indicator appears to the left of the profile picture in your contacts list, which enables you to see at a glance the online status of your contact. You can click the contact to display the person's contact card. (See Figure 11-12.) This card shows the various communications methods you can use to be in touch with the person.

The methods of contacting someone that are available to you depend on the person's status. If a person's status is Offline, you cannot send her an instant message, but you can send an email message if you like.


Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Groups
Status
Relationship
Frequent Contacts
lisa_r- Busy
This looks pretty neat.
tahil- Offline
Other Contacts (0/0)
Italy team (0/1)
erik- Offline 10 mins
This looks pretty neat.
lisa_r
Busy Free for next 8 hours
marketing leader, marketing
Department marketing
Office
Work
Mobile
Home
Email lisa_r@bloomsandblossoms.onmicrosoft...
Calendar Free for next 8 hours
Location Eastern Daylight Time (10:36 AM)
Contact
Organization

Click to choose communication methods.

Expand Contact Card tool

Additional contact information

FIGURE 11-12 Click the contact to display the contact card and choose a way to communicate.

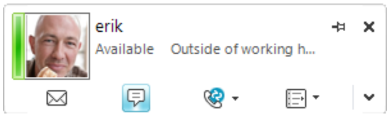
Instant Messaging with Your Team

There's a great kind of freedom inherent in instant messaging. You have a question—ask it! Are you wondering how things are going on the new design? Send your team an IM and find out.

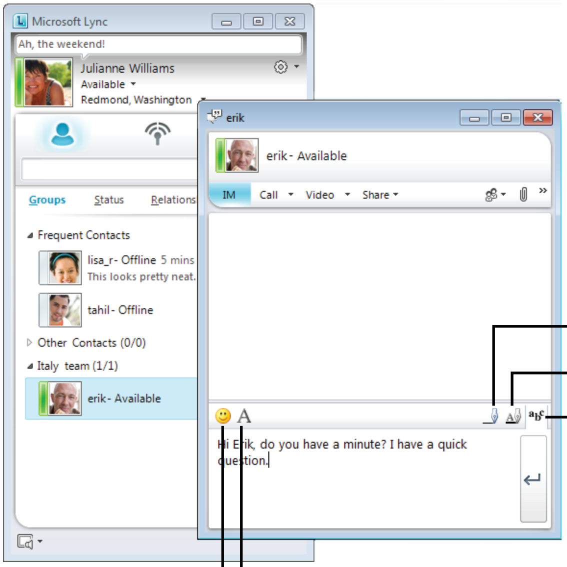
Of course, for those of us who *love* to be in touch, instant messaging can be a bit addictive—and annoying to those who don't want to be interrupted 20 times a day. (Hence, the need for the Away or Busy statuses in Lync.)

When you want to instant message one or many people on your team, you begin in the Lync window and follow these steps:

1. Click the contact you want to send an instant message to. The person's contact card appears.
2. Click the instant message icon.


erik
Available Outside of working h...

3. In the instant message window, type your message in the lower text box.
4. You can change the format, write the message as ink (if you have a drawing tablet or other pen device), and click Send The Message. (See Figure 11-13.)
5. When your contact responds, the response appears in the text box at the top of the message window. You can reply by repeating steps 3 and 4 as often as needed.


Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Groups
Status
Relations
Frequent Contacts
lisa_r- Offline 5 mins
This looks pretty neat.
tahil- Offline
Other Contacts (0/0)
Italy team (1/1)
erik- Available
erik
erik- Available
IM
Call
Video
Share

Hi Erik, do you have a minute? I have a quick question.

Use ink to write your note.

Send an ink message as text.

Type and send the message as text.

Change the format of text.

Add an emoticon.

FIGURE 11-13 Create and format the instant message in the message window.

Tip

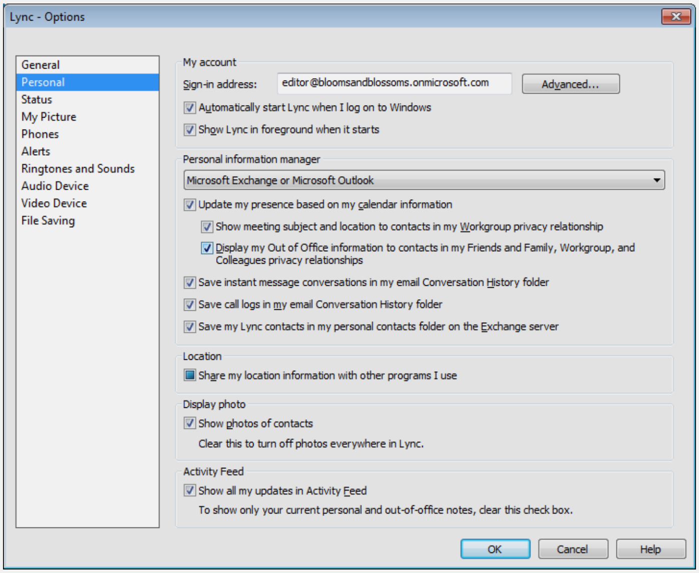
Tip

KEEPING A TRANSCRIPT OF YOUR CONVERSATION—OR NOT

By default, Lync keeps a transcript of your conversations so that the content of your conversations is always available to you for other meetings, projects, or conversations.

Lync stores your instant message conversations in the Conversation History folder that is actually available in Outlook Web App. To view past conversations, display Outlook (by clicking Inbox on the Office 365 Home page) and click the Conversation History folder in the folder list on the left side of the window. All your Lync communications that have been tracked appear in this view, and you can read through conversations to find what you need.

If you want to change the way Lync tracks your conversations—or perhaps turn off the logging of Lync exchanges—display the Lync Options dialog box by clicking Options in the top right of the Lync window, pointing to Tools, and clicking Options. Change the Save Instant Message Conversations In My Email Conversation History Folder option by clicking the check box. Similarly, you can stop keeping track of calls in the same folder by clearing the Save Call Logs In My Email Conversation History Folder check box.



My account

Sign-in address: editor@bloomsandblossoms.onmicrosoft.com

☑ Automatically start Lync when I log on to Windows

☑ Show Lync in foreground when it starts

Personal information manager

Microsoft Exchange or Microsoft Outlook

☑ Update my presence based on my calendar information

  ☑ Show meeting subject and location to contacts in my Workgroup privacy relationship

  ☑ Display my Out of Office information to contacts in my Friends and Family, Workgroup, and Colleagues privacy relationships

☑ Save instant message conversations in my email Conversation History folder

☑ Save call logs in my email Conversation History folder

☑ Save my Lync contacts in my personal contacts folder on the Exchange server

Location

■ Share my location information with other programs I use

Display photo

☑ Show photos of contacts

Clear this to turn off photos everywhere in Lync.

Activity Feed

☑ Show all my updates in Activity Feed

To show only your current personal and out-of-office notes, clear this check box.

Making a Call with Lync

When you want to call a contact directly through Lync, you can simply click the contact in your Lync window. The Call button appears. Click it, and then click in the Subject box and type the topic of your call. (See Figure 11-14.) When you click Lync Call, Lync dials the contact's listed phone number.

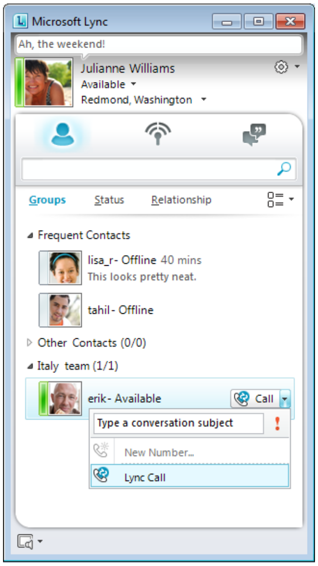

Microsoft Lync
Ah, the weekend!
Julianne Williams
Available
Redmond, Washington
Groups
Status
Relationship
Frequent Contacts
lisa_r- Offline 40 mins
This looks pretty neat.
tahil- Offline
Other Contacts (0/0)
Italy team (1/1)
erik- Available
Call
Type a conversation subject
New Number...
Lync Call

FIGURE 11-14 After you click the Call button, type a topic for the call and click Lync Call.

An alert message appears on the other person's desktop, and the computer "rings" so that the person can hear the incoming call. When the contact clicks the message box, he answers the call. During a call, any participant can make the following adjustments while the conversation is going on, as you see in Figure 11-15:

- **Mute Microphone** Turns off your microphone so that others can't hear you talk
- **Adjust Volume Or Mute Speakers** Changes the volume of the sound you hear
- **Display Dial Pad** Shows a number pad so that you can dial a phone number
- **Network Connectivity** Shows you how strong your connection is
- **Hold** Places the call on hold
- **Hang up** Ends the call

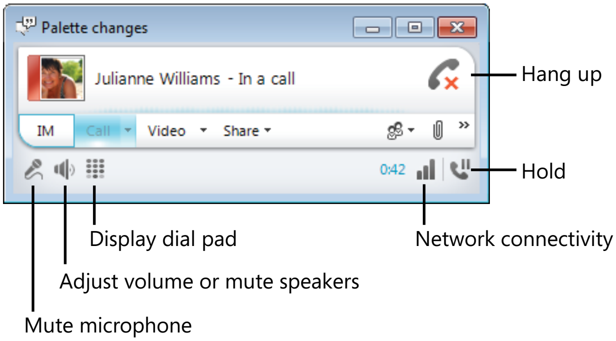

Palette changes
Julianne Williams - In a call
IM
Call
Video
Share
0:42
Hang up
Hold
Display dial pad
Network connectivity
Adjust volume or mute speakers
Mute microphone

FIGURE 11-15 You can change settings while you talk if you want to adjust sound levels or look something up.

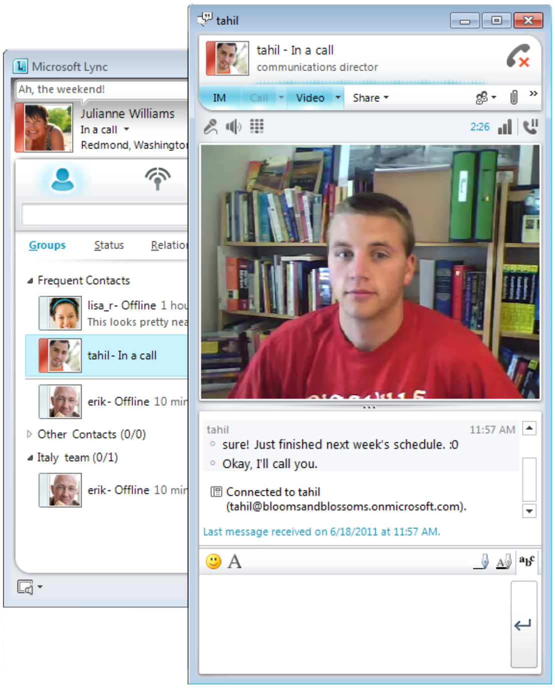
While you are on a call, your Lync status lets others know that you're busy and some communication methods are blocked. When you hang up, your status changes back to available automatically and other contacts will be able to contact you normally.

Launching a Video Call

If both you and your contact have webcams, you can also have a video call so that you can each see each other while you talk.

When you set up Lync, you went through the process of preparing your webcam, so the camera is ready to go whenever you are. When you want to make a video call, follow these steps:

1. Click the contact you want to talk to on your video call.
2. Open the instant messaging window, and send the contact a note if you'd like; then click Video and click Start Video Call.
3. A call is made to your contact. He clicks the message box and then clicks Accept Video Call.
4. The video appears in the top portion of the message window, and you can continue sending instant messages in the bottom portion of the window if you like. (See Figure 11-16.)
5. When you're finished with the call, click End Call to hang up.


Microsoft Lync
Ah, the weekend!
Julianne Williams
In a call
Redmond, Washingto
Groups
Status
Relatio
Frequent Contacts
lisa_r- Offline 1 hou
This looks pretty nea
tahil- In a call
erik- Offline 10 mi
Other Contacts (0/0)
Italy team (0/1)
erik- Offline 10 mi
tahil
tahil - In a call
communications director
IM
Call
Video
Share
2:26

tahil 11:57 AM
sure! Just finished next week's schedule. :0
Okay, I'll call you.

Connected to tahil
(tahil@bloomsandblossoms.onmicrosoft.com).

Last message received on 6/18/2011 at 11:57 AM.

FIGURE 11-16 You can have a video call and send instant messages at the same time in Lync.

Sharing Programs and Files

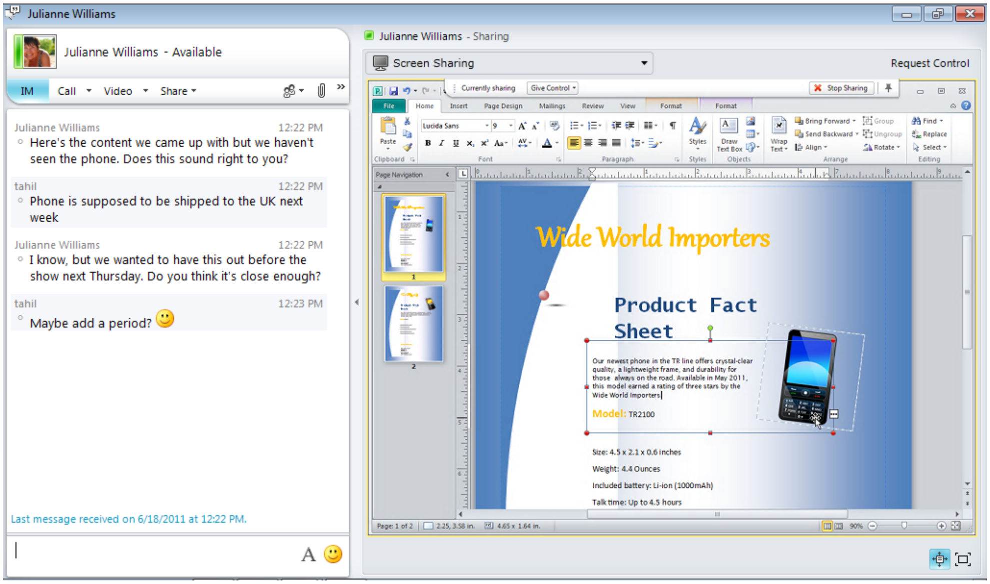
Another important task you might need regularly if your team works at a distance involves sharing files, folders, and programs. Suppose that someone on your team wants to share the design for the latest product brochure. Instead of emailing it to all team members and then discussing it at some future point, the person presenting the design idea can open the file on her desktop and then share her desktop with everyone in the group.

Similarly, if you want to plan a brainstorming session, you can open a whiteboard and invite everyone you want to attend to put their ideas on the virtual board and see what stands out.

And if you *do* want others to have their own copy of the design to go through in more detail, you can easily transfer files while you're in Lync so that all of you can literally be on the same page at the same time.

Sharing Your Desktop

The process of sharing your desktop is simple. Begin by opening an instant messaging session with one of your contacts. Click Share in the top of the messaging window, and click Desktop. Your desktop appears as an extension of the instant messaging window on your contact's computer. (See Figure 11-17.)


Julianne Williams
Julianne Williams - Available
IM
Call
Video
Share
Julianne Williams - Sharing
Screen Sharing
Request Control
Currently sharing
Give Control
Stop Sharing
File
Home
Insert
Page Design
Mailings
Review
View
Format
Format
Page Navigation
Page: 1 of 2
90%

Julianne Williams 12:22 PM
Here's the content we came up with but we haven't seen the phone. Does this sound right to you?

tahil 12:22 PM
Phone is supposed to be shipped to the UK next week

Julianne Williams 12:22 PM
I know, but we wanted to have this out before the show next Thursday. Do you think it's close enough?

tahil 12:23 PM
Maybe add a period?

Last message received on 6/18/2011 at 12:22 PM.

Wide World Importers

Product Fact Sheet

Our newest phone in the TR line offers crystal-clear quality, a lightweight frame, and durability for those always on the road. Available in May 2011, this model earned a rating of three stars by the Wide World Importers

Model: TR2100

Size: 4.5 x 2.1 x 0.6 inches

Weight: 4.4 Ounces

Included battery: Li-ion (1000mAh)

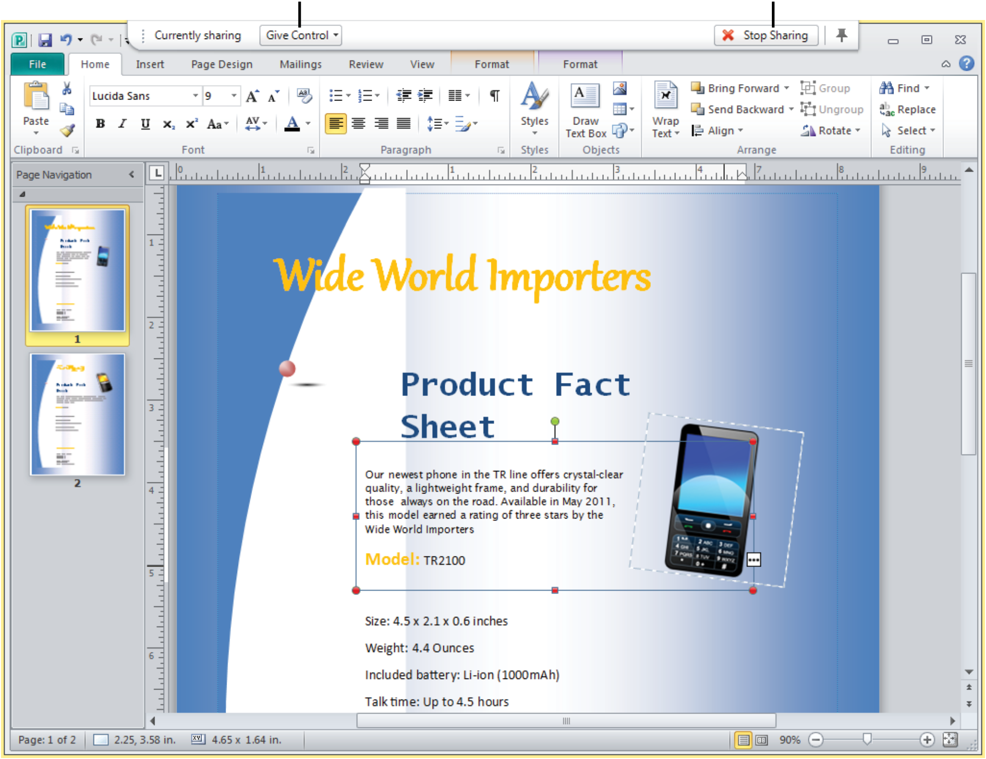
Talk time: Up to 4.5 hours

FIGURE 11-17 Your contact sees the instant messaging conversation on the left and your desktop in the stage area on the right.

You can transfer control of the screen display by clicking Give Control at the top of your sharing window and choosing the name of the contact to whom you want to transfer control. (See Figure 11-18.) You can talk or chat about the contents of the display and share what you need to share. When you're finished with the call, click Stop Sharing to end the sharing of your desktop and return to normal view. You can also click Release Control to let go of your control of the other user's computer.

Give another contact control of the screen display.

Click to stop sharing.



Currently sharing
Give Control
Stop Sharing
File
Home
Insert
Page Design
Mailings
Review
View
Format
Format
Paste
Clipboard
Lucida Sans
9
Font
Paragraph
Styles
Draw Text Box
Objects
Wrap Text
Bring Forward
Send Backward
Align
Group
Ungroup
Rotate
Arrange
Find
Replace
Select
Editing
Page Navigation
1
2
Page: 1 of 2
2.25, 3.58 in.
4.65 x 1.64 in.
90%

Wide World Importers

Product Fact Sheet

Our newest phone in the TR line offers crystal-clear quality, a lightweight frame, and durability for those always on the road. Available in May 2011, this model earned a rating of three stars by the Wide World Importers

Model: TR2100

Size: 4.5 x 2.1 x 0.6 inches

Weight: 4.4 Ounces

Included battery: Li-ion (1000mAh)

Talk time: Up to 4.5 hours

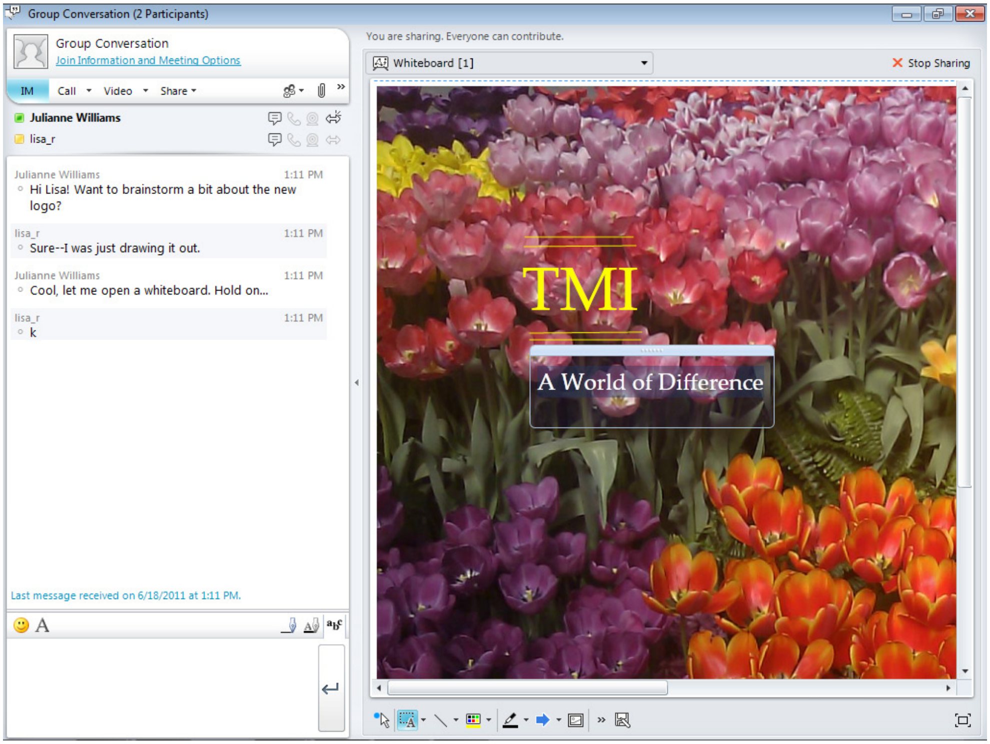
FIGURE 11-18 You can change control of the shared desktop and end sharing when you're ready by clicking the tools at the top of the sharing window.

Sharing Programs

The process of sharing actual programs on your computer is similar to sharing your desktop. Begin by opening the program you want to share, and then, in the instant messaging window, click Share and choose Program. Click the program you want to share with your contacts, and it appears in the stage area of your screen. You can draw, write, construct formulas, or do whatever else you want to demonstrate to your group and, when you're finished, click Stop Sharing to return your desktop control to only your view.

Using a Whiteboard

You can easily create a whiteboard session in which you and your colleagues can brainstorm about new ideas, projects, clients, and programs. When you start a whiteboard, by clicking Share during an instant messaging session and choosing New Whiteboard, Lync creates a Group Conversation that enables all participants to have equal input into what's happening on the screen. You can add images, add text, doodle, add shapes, change fonts, and more in the Whiteboard window. (See Figure 11-19.)


Group Conversation (2 Participants)
Group Conversation
Join Information and Meeting Options
IM
Call
Video
Share
Julianne Williams
lisa_r
You are sharing. Everyone can contribute.
Whiteboard [1]
Stop Sharing
TMI
A World of Difference

Julianne Williams 1:11 PM
Hi Lisa! Want to brainstorm a bit about the new logo?

lisa_r 1:11 PM
Sure--I was just drawing it out.

Julianne Williams 1:11 PM
Cool, let me open a whiteboard. Hold on...

lisa_r 1:11 PM
k

Last message received on 6/18/2011 at 1:11 PM.

FIGURE 11-19 When you share a whiteboard with your contacts, Lync opens a Group Conversation so all can participate.

You can use the tools at the bottom of the whiteboard to add all kinds of content to the page, as you see in Figure 11-20.

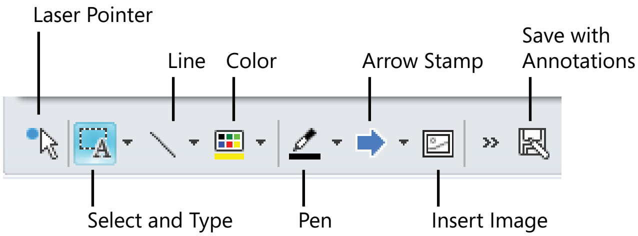


FIGURE 11-20 Use the Whiteboard tools to add content and notes to your developing ideas.

You can save the whiteboard so that you can view it or use the content later by clicking Save With Annotations at the far right of the Whiteboard tools row. The Save As dialog box appears so that you can navigate to the folder in which you want to store the whiteboard. Click Save to save the file.

Of course, you can continue to IM or talk on the phone while you work with the whiteboard, so communication continues in several ways at once. Similar to real-time, around-the-table collaboration, Lync makes it easy to share ideas, work collaboratively, and finish your projects together in real time.

What's Next

This chapter introduced you to Microsoft Lync, the great, instant-contact tool that is part of Office 365. With Lync, you can stay in touch with your team in real time through email, instant messaging, phone and video calls, desktop and program sharing, and whiteboards. This means you can keep the creative vibe going whether you work down the hall from your teammates or on different continents.

The next chapter shows you how to design, create, and manage the public-facing website that is yours as part of Office 365.

CHAPTER 12

Designing Your Public Website

IN THIS CHAPTER

- Getting started with your public website
- Choosing a theme and header style
- Choosing a custom color scheme
- Adding and formatting text
- Inserting, formatting, and aligning images
- Adding and organizing pages
- Selecting a navigation layout
- Adding gadgets to your site
- Optimizing your site for web search results
- Previewing and publishing your site
- What's next

IN ADDITION to all the tools you've already explored in Office 365—which enable you to organize your contacts, create document libraries, design a team site, stay on top of your email, and communicate in real time—Office 365 also includes a free public-facing website you can develop to present your company to the world. You might use your public website to showcase your products, talk about your services, introduce your staff, provide a map to your facility, tell happy customer stories, or much more.

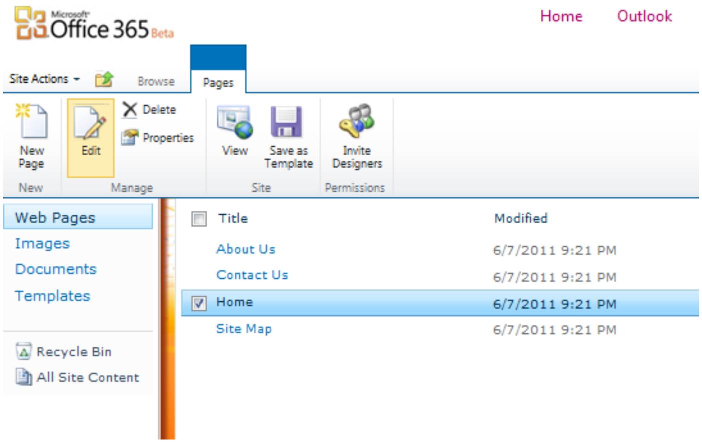
On your public website, you can include text, pictures, video, audio, PDFs, and other content. Perhaps your annual report will be downloadable. Maybe visitors can send in their email address to sign up for your monthly newsletter and get a catalog of your products.

No matter how you use the site, editing it and enhancing it in Office 365 is a breeze. With a full set of web-based editing tools, you can control colors, fonts, alignment, and more. This chapter shows you how.

Tip

Getting Started with Your Public Website

Your first step in creating your public website involves clicking the Admin tab and scrolling to the bottom of the Admin Overview page. (Note that you'll see the Admin link on the top right of the Office 365 window only if you have Administrator privileges.) Click the Edit Website link to display your site pages. To begin working on your site, click Home (your website Home page) and click Edit, as shown in Figure 12-1.

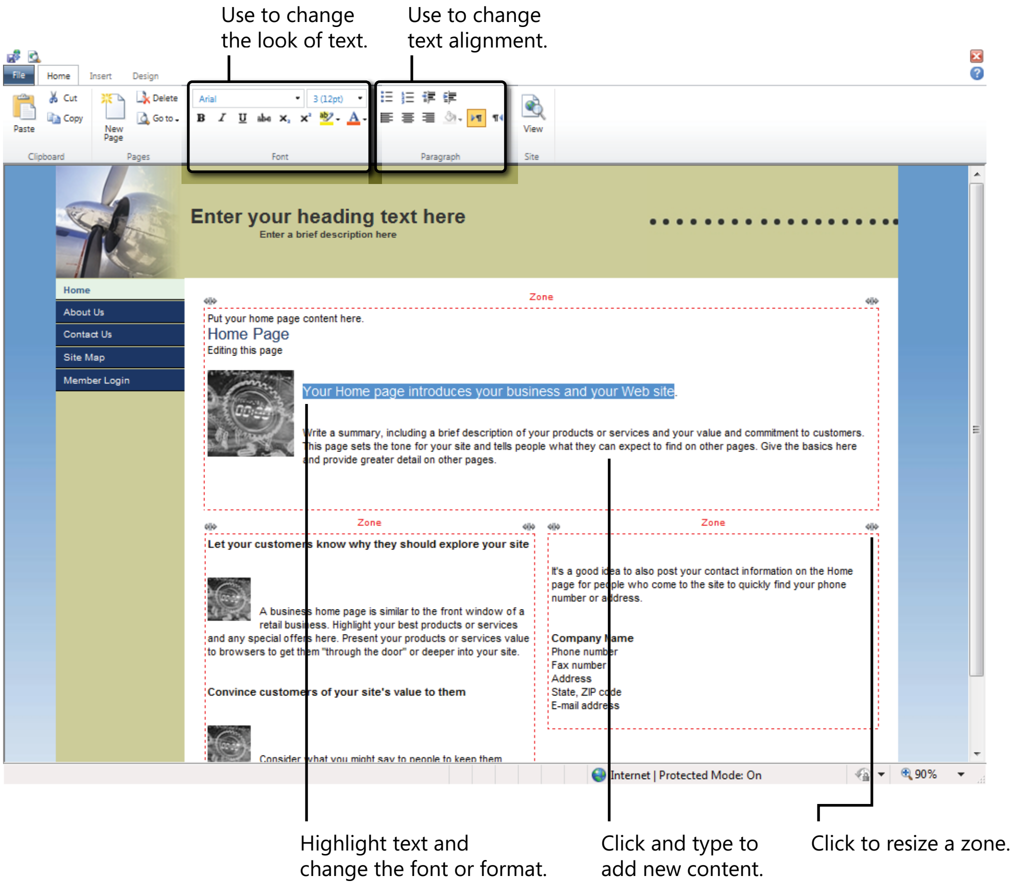

Microsoft Office 365 Beta
Home
Outlook
Site Actions
Browse
Pages
New Page
Edit
Delete
Properties
View
Save as Template
Invite Designers
New
Manage
Site
Permissions
Web Pages
Images
Documents
Templates
Recycle Bin
All Site Content

	Title	Modified
☐	About Us	6/7/2011 9:21 PM
☐	Contact Us	6/7/2011 9:21 PM
☑	Home	6/7/2011 9:21 PM
☐	Site Map	6/7/2011 9:21 PM

FIGURE 12-1 Click a page, and click Edit to begin making changes to your site.

Making Simple Web Changes

The easiest changes to make on your site involve simple text changes. You can click in any of the zones you want to change, highlight the text you want to remove, press Delete, and type the new text. You can use the formatting tools in the Font group of the Home tab to change the look of the text, and you can use the tools in the Paragraph group to change the format and alignment of the text on the page. (See Figure 12-2.)



Use to change the look of text.

Use to change text alignment.

File
Home
Insert
Design
Paste
Cut
Copy
New Page
Delete
Go to
Clipboard
Pages
Arial
3 (12pt)
Font
Paragraph
View
Site
Home
About Us
Contact Us
Site Map
Member Login
Zone
Zone
Zone
Internet | Protected Mode: On
90%

Enter your heading text here

Enter a brief description here

Put your home page content here.

Home Page

Editing this page

Your Home page introduces your business and your Web site.

Write a summary, including a brief description of your products or services and your value and commitment to customers. This page sets the tone for your site and tells people what they can expect to find on other pages. Give the basics here and provide greater detail on other pages.

Let your customers know why they should explore your site

A business home page is similar to the front window of a retail business. Highlight your best products or services and any special offers here. Present your products or services value to browsers to get them "through the door" or deeper into your site.

Convince customers of your site's value to them

Consider what you might say to people to keep them

It's a good idea to also post your contact information on the Home page for people who come to the site to quickly find your phone number or address.

Company Name
Phone number
Fax number
Address
State, ZIP code
E-mail address

Highlight text and change the font or format.

Click and type to add new content.

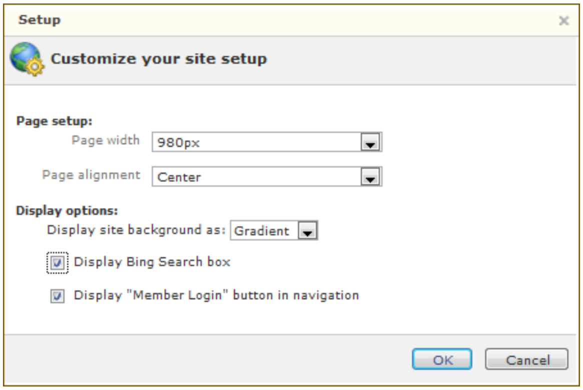
Click to resize a zone.

FIGURE 12-2 You can make simple text changes by typing new content and changing the format and alignment.

Tip

Setting Up Your Site

Some of the choices you'll make early on as you design your site will affect the entire layout of the public pages. Click the Design tab, and click Setup in the Site group to display the Setup dialog box. (See Figure 12-3.) Click the Page Width arrow, and choose the width of the page you want to display; click the Page Alignment arrow, and choose Center, Right, or Left.



Customize your site setup

Page setup:
Page width: 980px
Page alignment: Center

Display options:
Display site background as: Gradient
☑ Display Bing Search box
☑ Display "Member Login" button in navigation

FIGURE 12-3 Use the Setup options to set the page width and alignment for your entire website.

In the Display Options area, you can choose the way the background will be displayed on the site. Additionally, you can add the Bing search box to the site and enable the Member Login button so that those who are part of your Office 365 team can log in from the public site.

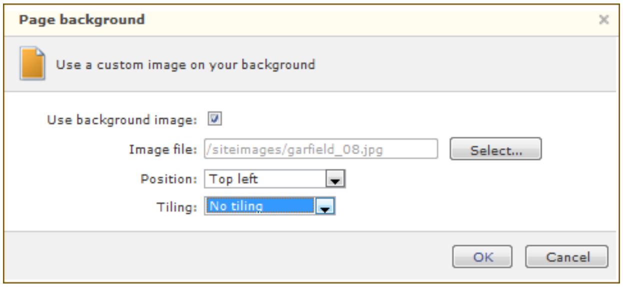
Tip

Applying a Page Background

One big change you can make to your page right away involves changing the look of the page background. Start by clicking the Background tool in the Page group on the Design tab. In the Page Background dialog box (shown in Figure 12-4), add a background image by following these steps:

1. Select the Use Background Image check box.
2. Click Select, and click Browse For An Image.
3. Navigate to the folder storing the file you want to add, select it, and click Insert Image.
4. Back in the Page Background dialog box, click the Position arrow and choose where on the page you want the picture to appear.
5. Click the Tiling arrow, and choose whether you want the image to be tiled (meaning it will be repeated as needed to fill the page) and, if so, how.
6. Click OK to save your choices.

Tip



Use a custom image on your background

Use background image: ☑

Image file: /siteimages/garfield_08.jpg

Position: Top left

Tiling: No tiling

FIGURE 12-4 You can add an image to the background of your page by clicking Background in the Page group of the Design tab.

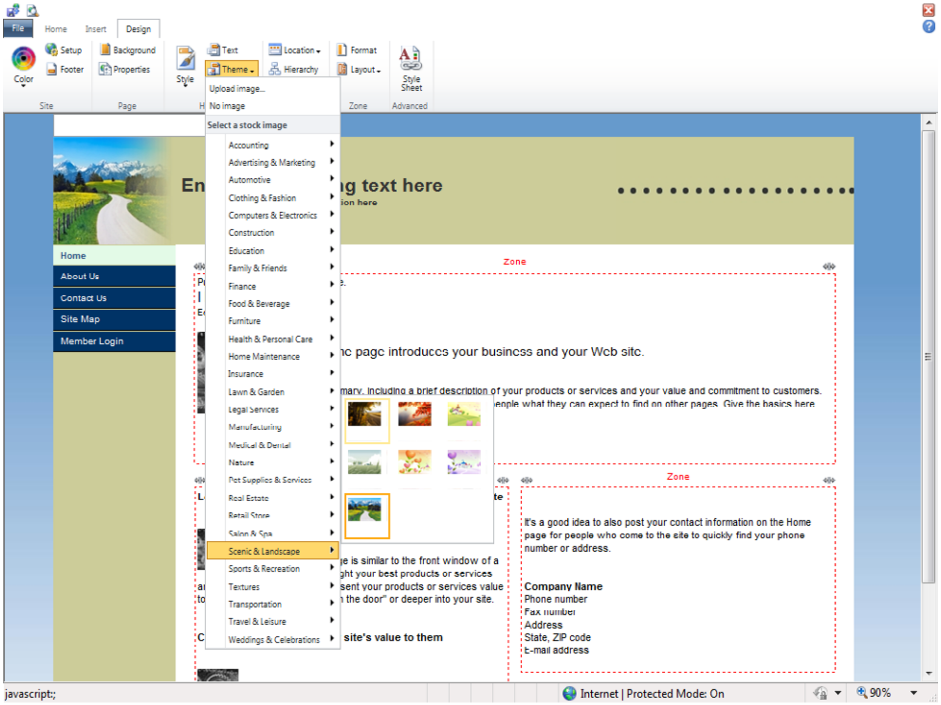
The background image you apply to your page will appear only in the center text area; the navigation panel and header areas are controlled by other formatting choices.

Choosing a Theme and Header Style

The way you design your site—with the colors, images, and navigation style—creates a kind of experience for your site visitors that communicates something about your organization and your services. If the colors are dark and the fonts are conservative, people might see your organization as being very serious. If the site is colorful and the fonts are playful, visitors might view your company as creative or whimsical.

You can choose a theme in your Office 365 site to apply a set of colors and a logo design for the site. Office 365 includes a huge range of theme choices that are designed to correspond with the type of business you are running. Even though there are a number of categories, you can choose whatever appeals to you—such as a Scenic & Landscape scene for your computer tech company—as long as you like the look and you feel it fits the overall tone you're trying to convey.

To choose a theme for your site, click the Design tab and click Theme in the Header group. A huge list of choices appears, as you see in Figure 12-5. Point to the various categories to see the galleries of styles you can apply to your site. When you find the one you want, click it and Office 365 applies it to your site.


File
Home
Insert
Design
Color
Setup
Footer
Background
Properties
Style
Text
Theme
Location
Hierarchy
Format
Layout
Style Sheet
Site
Page
Zone
Advanced
Upload image...
No image
Select a stock image
Accounting
Advertising & Marketing
Automotive
Clothing & Fashion
Computers & Electronics
Construction
Education
Family & Friends
Finance
Food & Beverage
Furniture
Health & Personal Care
Home Maintenance
Insurance
Lawn & Garden
Legal Services
Manufacturing
Medical & Dental
Nature
Pet Supplies & Services
Real Estate
Retail Store
Salon & Spa
Scenic & Landscape
Sports & Recreation
Textures
Transportation
Travel & Leisure
Weddings & Celebrations
Home
About Us
Contact Us
Site Map
Member Login
Zone
Zone
javascript:;
Internet | Protected Mode: On
90%

It's a good idea to also post your contact information on the Home page for people who come to the site to quickly find your phone number or address.

Company Name
Phone number
Fax number
Address
State, ZIP code
E-mail address

FIGURE 12-5 Click Theme in the Header group to change the theme of your site.

If you don’t like the effect, you can change the theme and experiment with many other looks. Just remember to keep your visitors in mind, which means you should consider not only your personal color preferences but also the overall site design and how well (or not) it matches the message you want your visitors to receive.

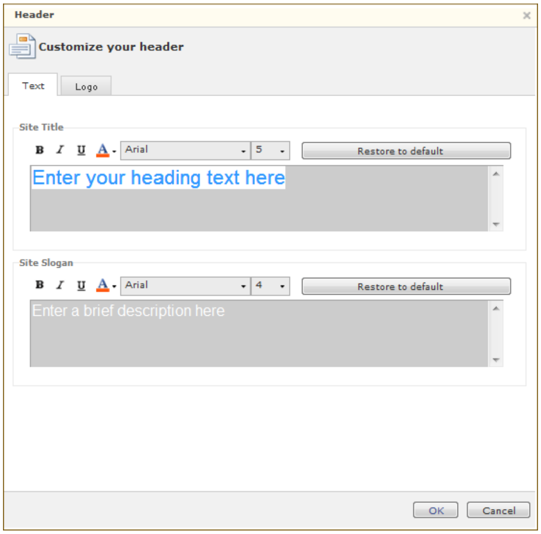
WHAT’S IN A THEME?

Not all themes are created equal. Each theme you select in Office 365 has been professionally designed to present a specific look and feel. All items in the theme are coordinated so that they look good together and provide a professional, polished look for your site.

Changing the Site Header

The site header is the area at the top of your webpages that gives a consistent look and feel to your site. The header is repeated from page to page so that site visitors recognize the continuity throughout your site.

To change the header, click the Design tab and click Text in the Header group or click the header to display the Header dialog box. In the Header dialog box (shown in Figure 12-6), type the text you want to appear as the header for the site, and use the formatting tools to change the style and font of the text.



Site Title: Arial, 5

Enter your heading text here

Site Slogan: Arial, 4

Enter a brief description here

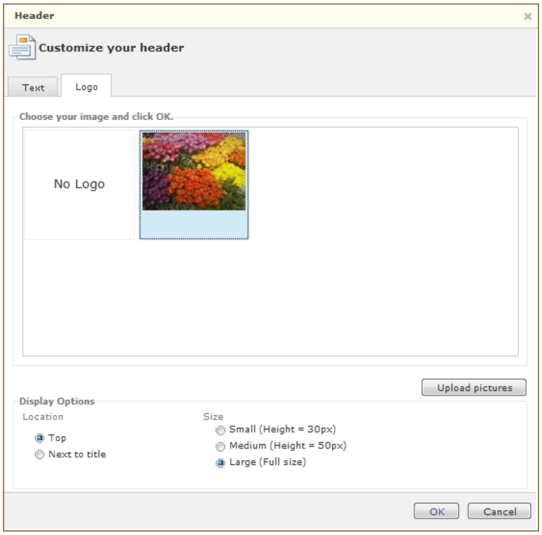
FIGURE 12-6 Enter a heading and a description for your site in the Header dialog box.

You can also add a site slogan, which is a description that will appear below the header, by clicking in the Site Slogan box and typing your description. Again, format it as you'd like, and click OK to return to the site and view your changes.

Add a Logo to Your Site

If you have a customized logo saved as a .jpg or .bmp file, you can easily add it to your site in Office 365. The process is simple—it's similar to adding a photo or piece of clip art to your pages. Here are the steps:

1. Click Text in the Header group of the Design tab.
2. Click the Logo tab.
3. Click Upload Pictures if you need to add your logo image to the dialog box.
4. Click the image you want to use as the logo. (See Figure 12-7.) If you decide you want to forgo the logo altogether, click No Logo.
5. In the Display Options area, select whether you want the logo to appear at the top of each page of the site or beside the page title.
6. In the Size area, choose Small, Medium, or Large for the size of the logo.
7. Click OK to save your changes.



Display Options

Location
● Top
○ Next to title

Size
○ Small (Height = 30px)
○ Medium (Height = 50px)
● Large (Full size)

FIGURE 12-7 Add a logo using the Logo tab in the Header dialog box.

WHAT MAKES A GOOD LOGO GOOD?

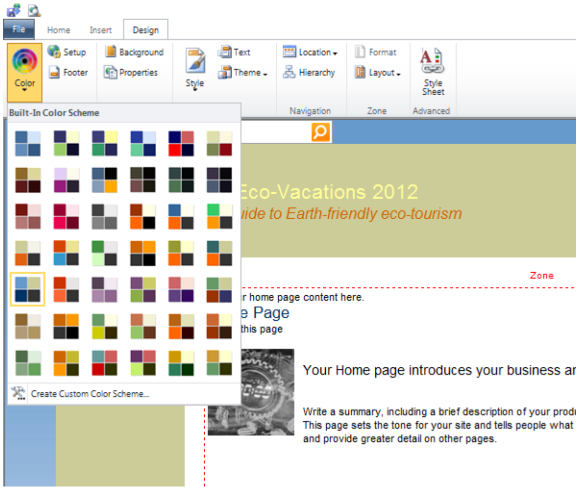
Are there some characteristics that “good” logos have that other logos don’t? Think of the logos you’re most likely to recognize. Chances are that you see them everywhere—Coke, IBM, Nike, Dell. What do they all have in common? Colors we remember. A simple, strong design. Bold characters. Think about what makes your logo memorable in the minds of your site visitors, and be sure to use your logo consistently on all printed and web materials.

Choosing a Custom Color Scheme

Similar to the way in which your theme creates an experience for your visitors, the color scheme you select says a lot about your business or organization. Red is a high-energy color; blue is passive; green is relaxing; yellow is stimulating. (Be careful about how much yellow you use because a little goes a long way and used to excess could make your page more difficult for visitors to read.) Visit some of your favorite sites. How do they use color? How does the design make you feel?

You can easily apply a new color scheme by following these steps:

1. Click the Design tab.
2. Click the Color tool in the Site group on the far left end of the Design tab. (See Figure 12-8.) A list of color palettes appears.
3. Click the color palette you like. The colors are immediately applied to the theme you selected, overriding any other colors in use.


File
Home
Insert
Design
Color
Setup
Footer
Background
Properties
Style
Text
Theme
Location
Hierarchy
Navigation
Format
Layout
Zone
Style Sheet
Advanced
Built-In Color Scheme
Create Custom Color Scheme...
Zone

Eco-Vacations 2012
uide to Earth-friendly eco-tourism

r home page content here.
e Page
this page

Your Home page introduces your business ar

Write a summary, including a brief description of your prodı
This page sets the tone for your site and tells people what
and provide greater detail on other pages.

FIGURE 12-8 Choose a color palette, and select a coordinated look for your public website.

Adding and Formatting Text

What do you want to say on your website? Most businesses try for a mix of friendly and factual, welcoming visitors and making sure they are able to find what they're looking for with the fewest number of clicks possible. For example, if you're hoping visitors will download a copy of your product catalog—and you think people will likely be coming to your site to do that—feature the catalog somewhere prominently on your site (either on the Home page or as a link that is plainly visible to visitors) so that they can find what they need and download it quickly. This gives visitors a good feeling about your site, which means they're likely to come back.

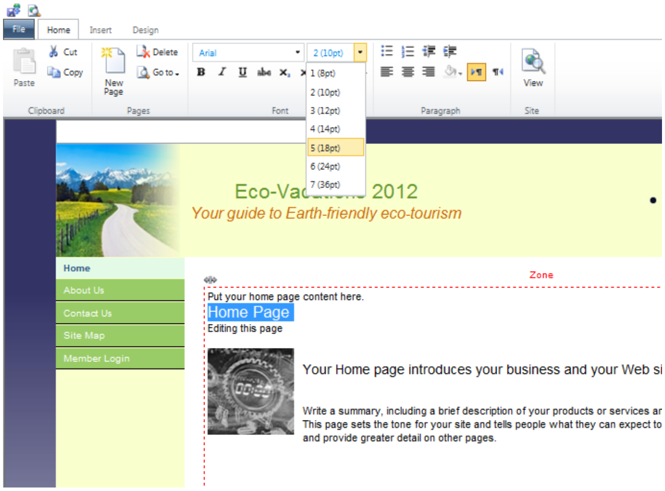
There's a delicate balance about how *much* text you want on your site, however. Even though you want visitors to find what they need, you don't want them to wear themselves out by reading too much about it. So keep your content short and sweet. If you must go into great detail about a process or a product, create a new page the user can visit if they decide they want to read more about it.

It's a simple thing to add text on your Office 365 pages, but there's no Undo tool to undo your changes—so it's a good idea to be certain about your edits before you make them. As mentioned earlier in this chapter, the easiest way to add content is to click the zone where you want to change the text, delete what's there, and add your new text. After you've added your new content, you can use the various formatting tools to give it just the look you want.

Formatting Your Headings

Your pages include placeholder text in each of the zones on the pages you work with. You can choose to use the format already there or change it to fit the tone of your site. Here's how to change the look of the zone headings on your page:

1. Display the page you want to change.
2. Highlight the text you want to use as a heading.
3. In the Home tab, click the Font arrow and choose a font from the displayed list.
4. Click Bold, Italic, or Underline as desired.
5. Click the Font Size arrow, and choose a size from the list. (See Figure 12-9.)
6. Click the Font Color arrow, and choose a color from the palette.


File
Home
Insert
Design
Cut
Copy
Paste
New Page
Delete
Go to
Arial
2 (10pt)
1 (8pt)
2 (10pt)
3 (12pt)
4 (14pt)
5 (18pt)
6 (24pt)
7 (36pt)
View
Clipboard
Pages
Font
Paragraph
Site
Eco-Vac 2012
Your guide to Earth-friendly eco-tourism
Home
About Us
Contact Us
Site Map
Member Login
Zone

Put your home page content here.

Home Page

Editing this page

Your Home page introduces your business and your Web si

Write a summary, including a brief description of your products or services ar
This page sets the tone for your site and tells people what they can expect to
and provide greater detail on other pages.

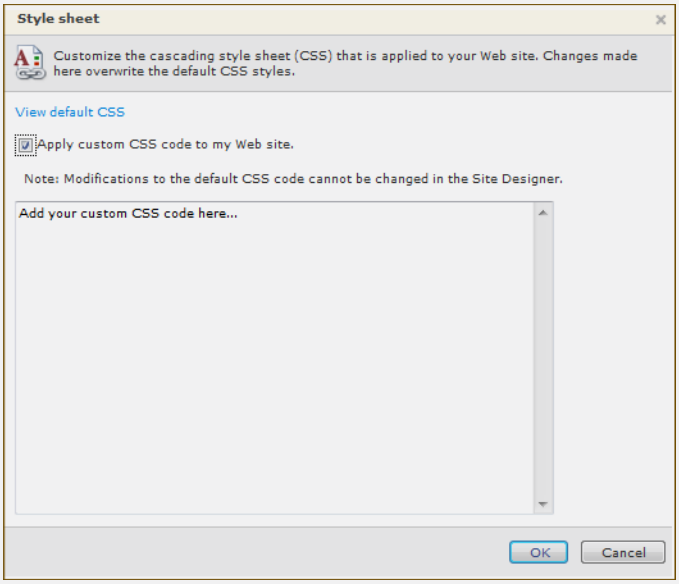
FIGURE 12-9 The font sizes in the Font Size list show both the HTML sizes and the more familiar point sizes for the text.

Text sizes in HTML are shown in size levels ranging from 1 to 7, with 1 being the smallest and 7 being the largest. In print documents, text size is generally shown in *points*, a typographical term used to indicate the height of a character on a printed line. Because 72 points equals one inch, a 72-point letter will be one-inch tall on the printed page.

ATTACHING A CSS STYLE SHEET

If you are accustomed to working with web design, you might have a cascading style sheet (CSS) you've used for other web projects in your business that you'd like to apply to your Office 365 site.

You can add the CSS code directly to your site by clicking the Design tab and clicking Style Sheet in the Advanced group. In the Style Sheet dialog box, you can paste the CSS code you want to include on the site. Select the Apply Custom CSS Code To My Web Site check box, and click OK. The new code is added to your site, and you can add CSS styles when you use the HTML module to enter code directly to the site.



Customize the cascading style sheet (CSS) that is applied to your Web site. Changes made here overwrite the default CSS styles.

☑ Apply custom CSS code to my Web site.

Note: Modifications to the default CSS code cannot be changed in the Site Designer.

Add your custom CSS code here...

Creating Lists

Chances are you know all about bulleted and numbered lists. You use the tools in your word processor, you see them in PowerPoint—you know the drill.

Bulleted and numbered lists are nice to use on websites because they offer information in a succinct, clear format. The reader's eye is drawn to scan a list quickly, and that adds to a feeling of effective communication on the site.

When you want to create a bulleted list on your Office 365 webpage, click in the zone where you want to add the list, click the Bulleted List tool in the Paragraph group of the

Home tab, and type your list. Each time you press Enter, the cursor moves to the next line and a bullet is inserted. Click the tool again to turn the format off. You can also turn existing text into a list by selecting it and then clicking the Bulleted List tool.

A numbered list works similarly. Click the tool and type your list, or select the text and click the tool.

Tip

Adding Hyperlinks

Everything you've done so far—add and format text, choose a color scheme, apply a theme, customize the header—is an important part of creating a good experience for your site visitors. But without hyperlinks, the links that take people from one page to another, nothing on the web would work. Links bring visitors to your site and help them find what they need while they are there.

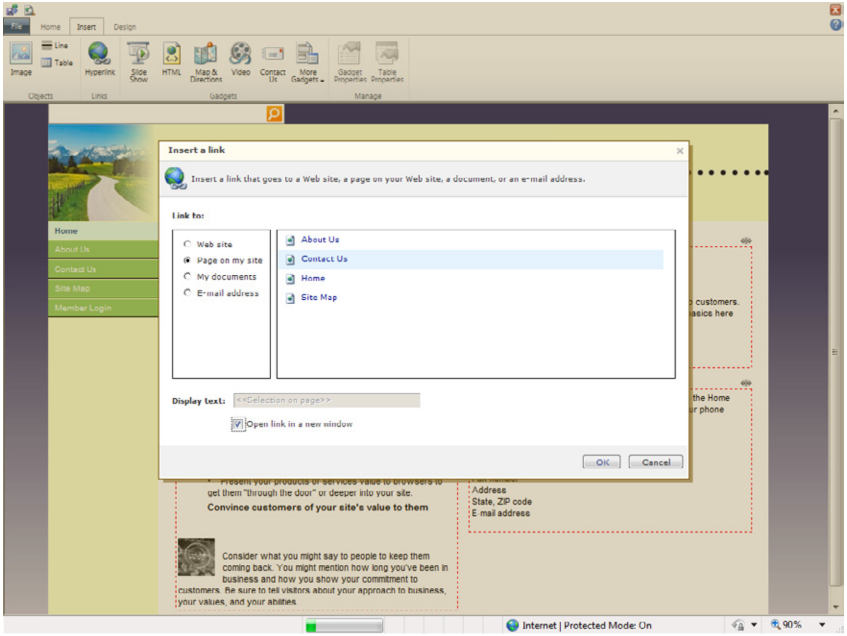
You can add hyperlinks easily to your Office 365 pages. Here's how:

1. On the page, highlight the text to which you want to apply the link.
2. Click the Insert tab, and click Hyperlink.
3. In the Insert A Link dialog box (shown in Figure 12-10), select the type of link you want to create:
   - Click Web Site if you want to enter the address of a site you want to link to.
   - Click Page On My Site if you want to link to one of the other pages in your site.
   - Click My Documents if you want to create a link that enables a user to open or save a document.
   - Click E-mail Address if you want to create a link that opens an email window.
4. For example, if you click Web Site, a Link box will appear. You can click in the Link box, and type the web address of the page, file, or document you want to use as the target of the link.

The Link option changes depending on the type of link you select. If you choose Page On My Site, you'll see a list of pages so that you can select the page in your site you want to use. If you click My Documents, files from your document library appear so that you can choose the document you want to link to.

5. If you want the target of the link (another site, a page in your own site, an email window, or a document) to open in a new window on top of your website window, select the Open Link In A New Window check box.
6. Click OK to save your changes and create the link.

Tip


File
Home
Insert
Design
Image
Line
Table
Hyperlink
Slide Show
HTML
Map & Directions
Video
Contact Us
More Gadgets
Gadget Properties
Table Properties
Objects
Links
Gadgets
Manage
Home
About Us
Contact Us
Site Map
Member Login
Internet | Protected Mode: On
90%

Insert a link

Insert a link that goes to a Web site, a page on your Web site, a document, or an e-mail address.

Link to:

○ Web site
● Page on my site
○ My documents
○ E-mail address

About Us
Contact Us
Home
Site Map

Display text: <<Selection on page>>

☑ Open link in a new window

OK Cancel

FIGURE 12-10 To add a link to your page, select the text you want to link and click Hyperlink.

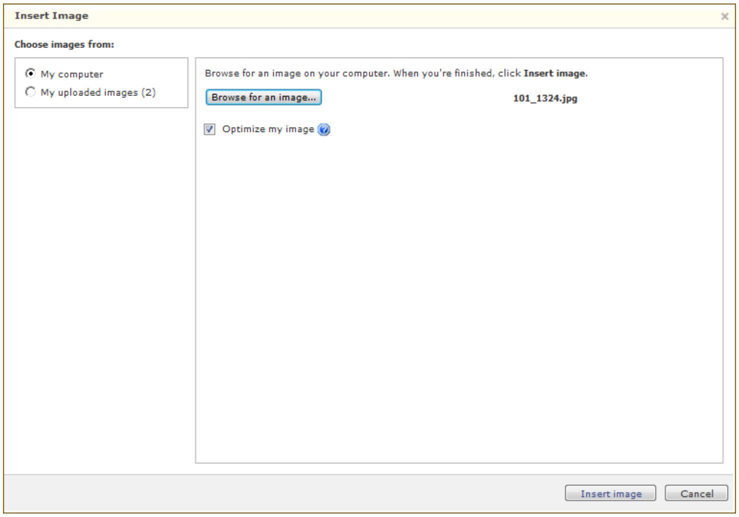
Inserting, Formatting, and Aligning Images

As the web has matured, people have come to expect more pictures on web pages. This is part design and part function. Pictures can showcase products, illustrate services, and introduce important personalities. Pictures also give the reader's eye a rest and keep a page from feeling too full of text.

What kinds of images will you show on your web pages? You might want to consider the following:

- Product photos
- Staff photos
- Service-related images
- A photo of your facility
- A map to your office

You begin the process of adding pictures by clicking Images in the Objects group on the Insert tab. The Insert Image dialog box appears, as you see Figure 12-11. Click whether you want to choose images from your computer or from images you've already uploaded to Office 365. Then click Browse For An Image and navigate to the folder containing the image you'd like to add. Click Insert Image, and the image is added to your page.



Choose images from:

● My computer
○ My uploaded images (2)

Browse for an image on your computer. When you're finished, click **Insert image.**

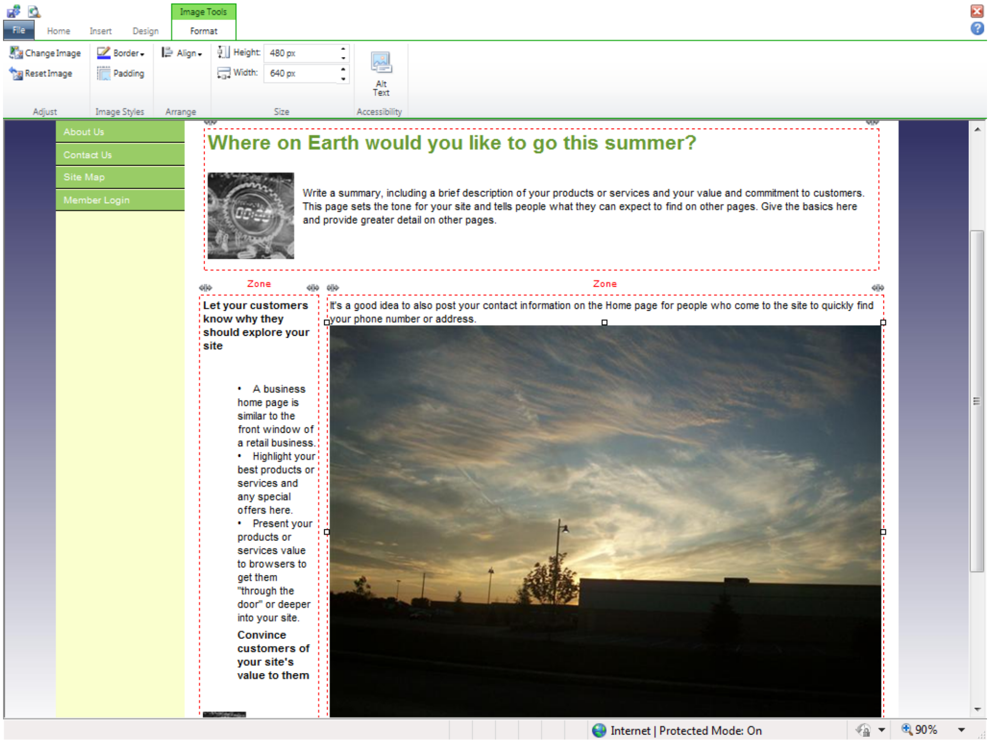
101_1324.jpg

☑ Optimize my image

FIGURE 12-11 Click Browse For An Image to add a new picture to your page.

Formatting Your Picture

After you position your picture on the page, you might find that it needs some tweaking. Perhaps it's too big (like the photo in Figure 12-12). Or perhaps it comes too close to the surrounding text. You can fix those problems—and more—by clicking the Image Tools Format tab, which is available when the picture is selected on the page.


File
Home
Insert
Design
Image Tools
Format
Change Image
Reset Image
Adjust
Border
Padding
Image Styles
Align
Arrange
Height:
Width:
Size
Alt Text
Accessibility
About Us
Contact Us
Site Map
Member Login
Zone
Zone
Internet | Protected Mode: On
90%

Height: 480 px

Width: 640 px

Where on Earth would you like to go this summer?

Write a summary, including a brief description of your products or services and your value and commitment to customers. This page sets the tone for your site and tells people what they can expect to find on other pages. Give the basics here and provide greater detail on other pages.

Let your customers know why they should explore your site

- A business home page is similar to the front window of a retail business.
- Highlight your best products or services and any special offers here.
- Present your products or services value to browsers to get them "through the door" or deeper into your site.

Convince customers of your site's value to them

It's a good idea to also post your contact information on the Home page for people who come to the site to quickly find your phone number or address.

FIGURE 12-12 Use the tools in the Image Tools Format tab to format and align your image.

The Image Tools Format tab provides you with a set of tools you can use to format the image on your page. In addition to working with the alignment (which is discussed in the next section), you can do any of the following:

- Click Change Image to replace the selected picture with a new photo you select from your computer or from your uploaded images.
- Choose Reset Image to remove all formatting changes.

- Click Border to choose the color and thickness for a border you apply to the picture.
- Use Padding to set a margin of space around the selected image.
- Click in the Height and Width boxes, and type new values to resize the photo on the page.
- Click Alt Text, and enter a description of the photo for visitors who can't view the image.

For example, the picture in Figure 12-12 clearly needs to be resized. You can do this one of two ways: You can click one of the handles on the image and drag it in the direction you want to resize the image. Or you can click in the Height and Width boxes in the Image Tools Format tab and type new values for the settings to resize the picture.

Setting the Alignment for Images

Next you need to think about how you want the image to align on the page. The alignment of the image controls how—or whether—text wraps around the picture. To change the way your picture aligns, follow these steps:

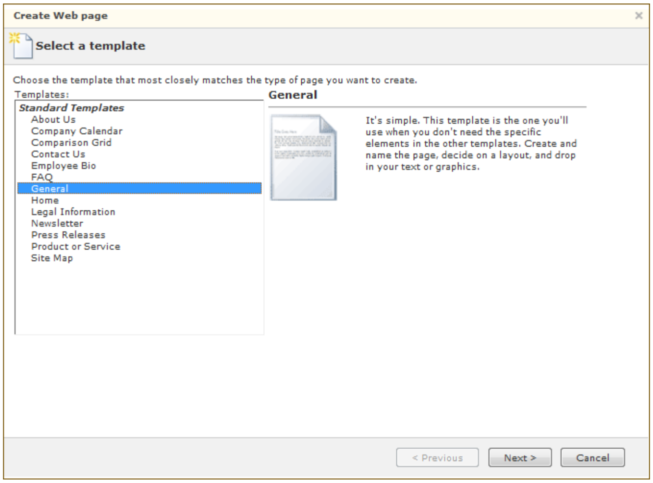
1. Click the image on the web page.
2. Click Align in the Image Tools Format tab.
3. Click No Text Wrapping, Float Right, or Float Left.

No Text Wrapping leaves the picture as is on the page and doesn't cause the text to wrap around the picture. If you choose Float Right, text flows around the image on the left. Similarly, if you click Float Left, the text wraps around the image on the right.

Adding and Organizing Pages

When you're first creating your site, four pages might seem like a lot of space to fill. As you begin adding content and photos, you might discover that those pages fill up quickly and you need to add more. You add pages by using the New Page tool on the Home tab. Here's how to do it:

1. Click the Home tab.
2. Click New Page. The Create Web Page dialog box appears. (See Figure 12-13.)


Create Web page
Select a template
Templates:
Standard Templates
About Us
Company Calendar
Comparison Grid
Contact Us
Employee Bio
FAQ
General
Home
Legal Information
Newsletter
Press Releases
Product or Service
Site Map
General
< Previous
Next >
Cancel

Choose the template that most closely matches the type of page you want to create.

It's simple. This template is the one you'll use when you don't need the specific elements in the other templates. Create and name the page, decide on a layout, and drop in your text or graphics.

FIGURE 12-13 Choose a template for the new web page you want to create.

3. Click a template for the type of page you want to create, and click Next.

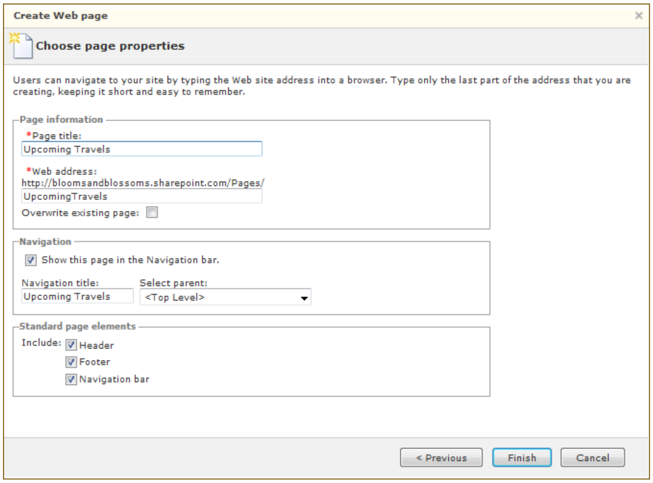
Tip

4. On the Choose Page Properties page, type a title for the new page.
5. Click in the Web Address field, and modify the suggested page name if you like.

Tip

6. In the Navigation area, leave the check box selected if you want the page to appear in the navigation bar.

7. Type the title you want to appear in the navigation bar and, if the page will be a subpage of an existing page, click the Select Parent arrow and choose the page from the displayed list. (See Figure 12-14.)
8. Click Finish to add the page to your site.


Create Web page

Choose page properties

Users can navigate to your site by typing the Web site address into a browser. Type only the last part of the address that you are creating, keeping it short and easy to remember.

Page information

*Page title: Upcoming Travels

*Web address: http://bloomsandblossoms.sharepoint.com/Pages/ UpcomingTravels

Overwrite existing page: ☐

Navigation

☑ Show this page in the Navigation bar.

Navigation title: Upcoming Travels

Select parent: <Top Level>

Standard page elements

Include: ☑ Header
☑ Footer
☑ Navigation bar

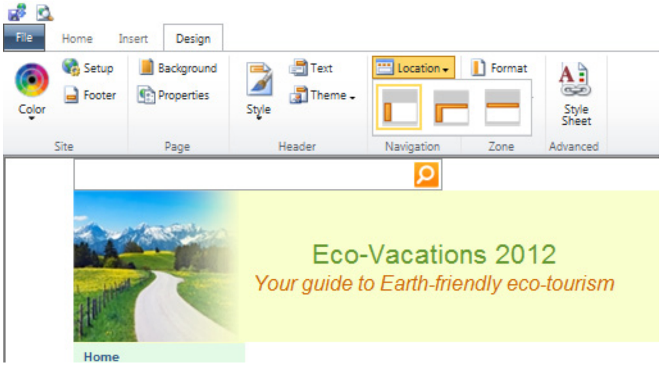
FIGURE 12-14 Enter page properties to assign a title, address, and navigation title for the page.

Selecting a Navigation Layout

By default, Office 365 displays the navigation panel for your site along the left side of the page. But there are a total of three navigation layouts you can use for your site. In addition to the Left navigation which is chosen by default, you can use the Top & Left navigation layout or the Top navigation layout.

To choose a navigation style for your site, follow these steps:

1. Click the Design tab.
2. In the Navigation group, click the Location tool.
3. Click the Navigation style you like: Left, Top & Left, or Top. (See Figure 12-15.)

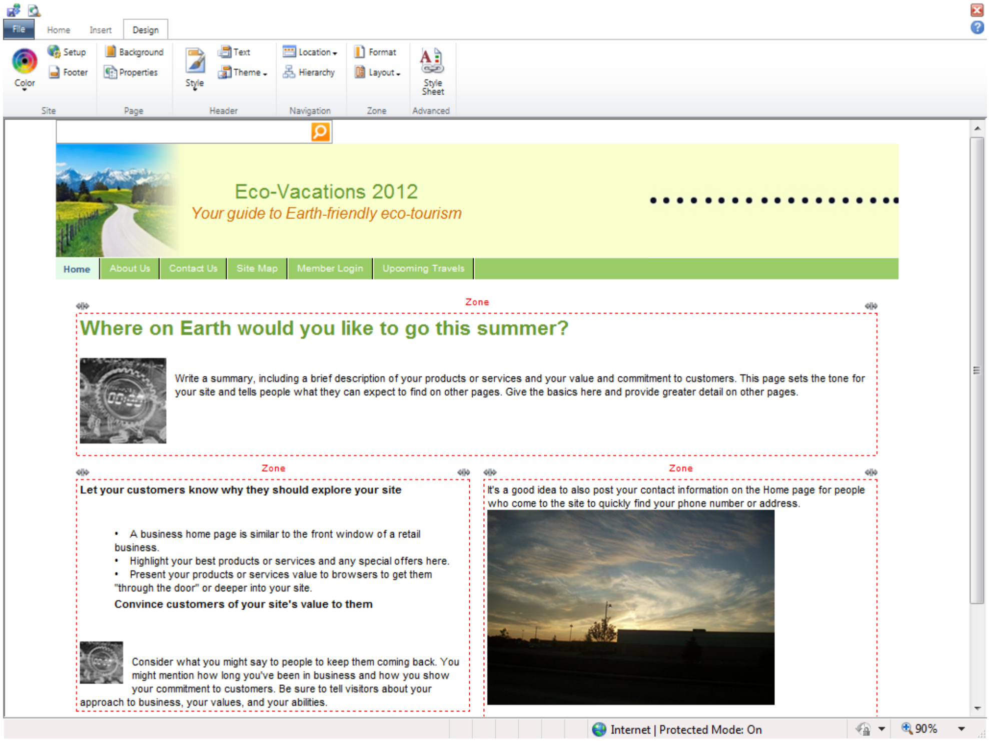

File
Home
Insert
Design
Color
Setup
Footer
Site
Background
Properties
Page
Style
Text
Theme
Header
Location
Navigation
Format
Zone
Style Sheet
Advanced
Home

Eco-Vacations 2012

Your guide to Earth-friendly eco-tourism

FIGURE 12-15 The navigation style you choose for your site has a big impact on how easily visitors can find what they need on your site.

The navigation changes are applied instantly. (See Figure 12-16.) If you want to change the navigation style, simply repeat the steps and choose a different style.


File
Home
Insert
Design
Color
Setup
Footer
Site
Background
Properties
Page
Style
Text
Theme
Header
Location
Hierarchy
Navigation
Format
Layout
Zone
Style Sheet
Advanced
Home
About Us
Contact Us
Site Map
Member Login
Upcoming Travels
Zone
Zone
Zone
Internet | Protected Mode: On
90%

Eco-Vacations 2012

Your guide to Earth-friendly eco-tourism

Where on Earth would you like to go this summer?

Write a summary, including a brief description of your products or services and your value and commitment to customers. This page sets the tone for your site and tells people what they can expect to find on other pages. Give the basics here and provide greater detail on other pages.

Let your customers know why they should explore your site

- A business home page is similar to the front window of a retail business.
- Highlight your best products or services and any special offers here.
- Present your products or services value to browsers to get them "through the door" or deeper into your site.

Convince customers of your site's value to them

Consider what you might say to people to keep them coming back. You might mention how long you've been in business and how you show your commitment to customers. Be sure to tell visitors about your approach to business, your values, and your abilities.

It's a good idea to also post your contact information on the Home page for people who come to the site to quickly find your phone number or address.

FIGURE 12-16 The Top navigation style positions page links between the page header and the content area.

Adding Gadgets to Your Site

One of the great perks of creating your website in Office 365 is that you can add a number of ready-made gadgets to your website. This means you can add all sorts of interesting extras that visitors to your site will enjoy using.

The gadgets already built into your Office 365 site are available on the Insert tab, as Figure 12-17 shows. Additional gadgets are available in the More Gadgets section. To add a gadget to your page, simply click in the zone where you want to add the gadget and then click the gadget you want to add.

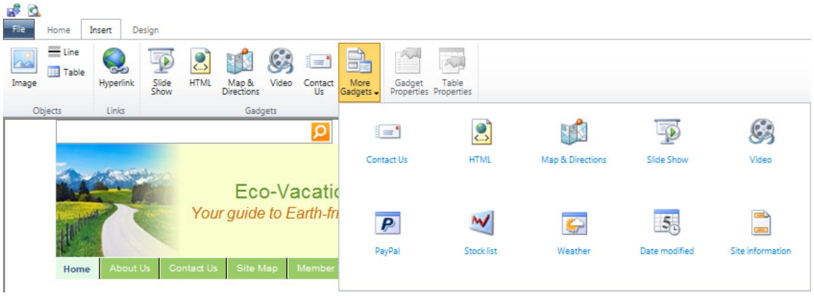
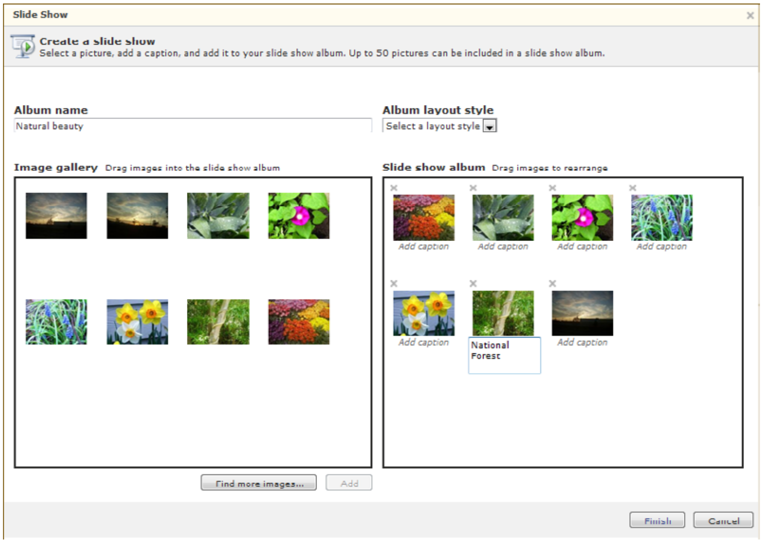

File
Home
Insert
Design
Image
Line
Table
Hyperlink
Slide Show
HTML
Map & Directions
Video
Contact Us
More Gadgets
Gadget Properties
Table Properties
Objects
Links
Gadgets
Contact Us
HTML
Map & Directions
Slide Show
Video
PayPal
Stock list
Weather
Date modified
Site information
Eco-Vacatic
Your guide to Earth-fr
Home
About Us
Contact Us
Site Map
Member

FIGURE 12-17 Insert a gadget by choosing the one you want on the Insert tab.

Figure 12-18 shows the Slide Show dialog box, which appears after you select the Slide Show gadget.



Slide Show

Create a slide show

Select a picture, add a caption, and add it to your slide show album. Up to 50 pictures can be included in a slide show album.

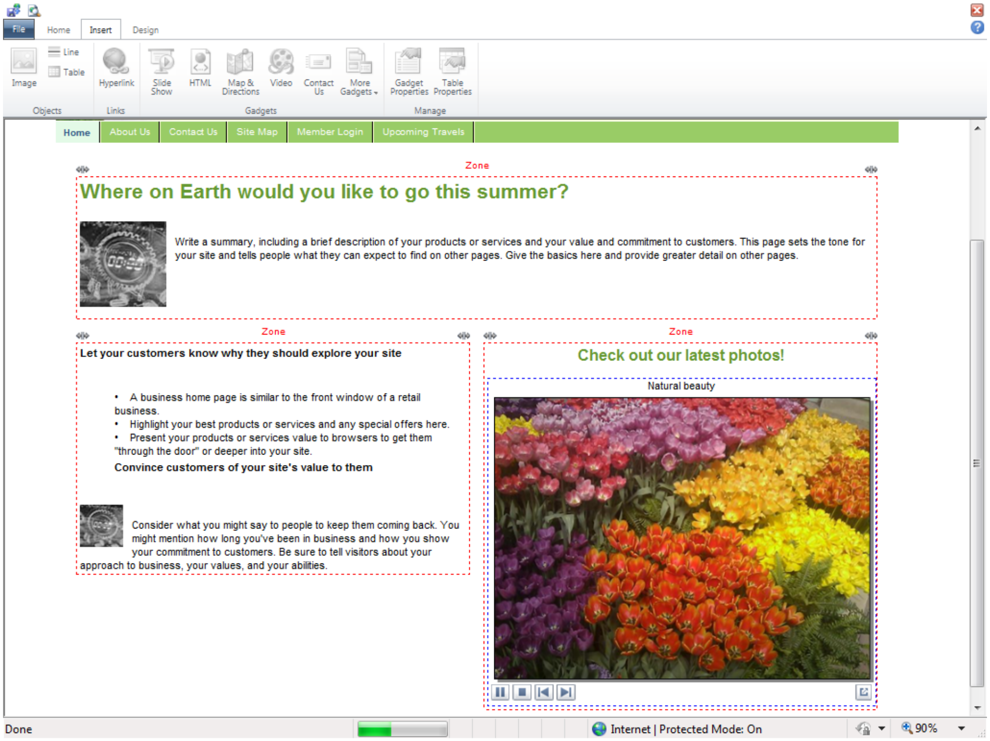
Album name: Natural beauty

Album layout style: Select a layout style

Image gallery Drag images into the slide show album
Slide show album Drag images to rearrange
Add caption
Add caption
Add caption
Add caption
Add caption
National Forest
Add caption
Find more images...
Add
Finish
Cancel

FIGURE 12-18 Adding the Slide Show gadget.

Enter a name for the album and then drag the photos you want to use to the panel on the right side of the window. You can click an Add Caption prompt to add captions for the figures you use. Click the Album Layout Style arrow, and choose whether you want to display a basic slide show or a revolving carousel. Click OK to add the gadget to your site. Figure 12-19 shows the Slide Show gadget on the webpage.


File
Home
Insert
Design
Image
Line
Table
Objects
Hyperlink
Links
Slide Show
HTML
Map & Directions
Video
Contact Us
More Gadgets
Gadgets
Gadget Properties
Table Properties
Manage
Home
About Us
Contact Us
Site Map
Member Login
Upcoming Travels
Zone
Zone
Zone
Natural beauty
Done
Internet | Protected Mode: On
90%

Where on Earth would you like to go this summer?

Write a summary, including a brief description of your products or services and your value and commitment to customers. This page sets the tone for your site and tells people what they can expect to find on other pages. Give the basics here and provide greater detail on other pages.

Let your customers know why they should explore your site

- A business home page is similar to the front window of a retail business.
- Highlight your best products or services and any special offers here.
- Present your products or services value to browsers to get them "through the door" or deeper into your site.

Convince customers of your site's value to them

Consider what you might say to people to keep them coming back. You might mention how long you've been in business and how you show your commitment to customers. Be sure to tell visitors about your approach to business, your values, and your abilities.

Check out our latest photos!

FIGURE 12-19 The Slide Show gadget has been added to the site.

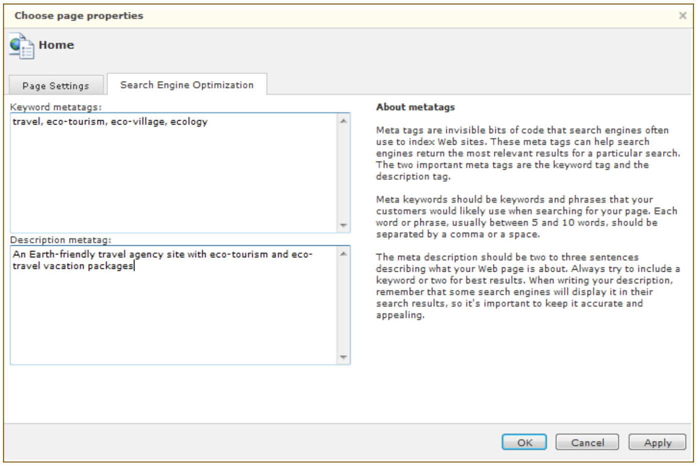
Optimizing Your Site for Web Search Results

One major consideration as you create your site is a single question: How will people find you?

With so many businesses and so many websites online, how will you stand out from your competition? What will bring potential customers to your site?

You can enter keywords and your site description to help your site get noticed by search engines such as Google, Bing, or other major search utilities. When someone enters a word or phrase that describes what they're searching for, if the word or phrase they enter matches the keywords or description you've entered for your site, your site might appear in that person's search results. So the best idea is to choose keywords that reflect what people are searching for. This helps new clients find you online.

You enter keywords and your site description by clicking the Design tab and clicking Properties. In the Choose Page Properties dialog box, click on the Search Engine Optimization tab, as shown in Figure 12-20. Click OK to save your changes.



Keyword metatags:

travel, eco-tourism, eco-village, ecology

Description metatag:

An Earth-friendly travel agency site with eco-tourism and eco-travel vacation packages

About metatags

Meta tags are invisible bits of code that search engines often use to index Web sites. These meta tags can help search engines return the most relevant results for a particular search. The two important meta tags are the keyword tag and the description tag.

Meta keywords should be keywords and phrases that your customers would likely use when searching for your page. Each word or phrase, usually between 5 and 10 words, should be separated by a comma or a space.

The meta description should be two to three sentences describing what your Web page is about. Always try to include a keyword or two for best results. When writing your description, remember that some search engines will display it in their search results, so it's important to keep it accurate and appealing.

FIGURE 12-20 Enter your keywords and a site description in the Choose Page Properties dialog box.

Previewing and Publishing Your Site

When you've selected your theme and colors, added text and images, and entered keywords, gadgets, and a site description, you might be ready to preview and publish your site. You can take a look at the way the site will look to the public by clicking View in the Site group of the Home tab.

If you're happy with the way things look, you can publish your site by clicking the File tab and clicking Save & Publish. (See Figure 12-21.)

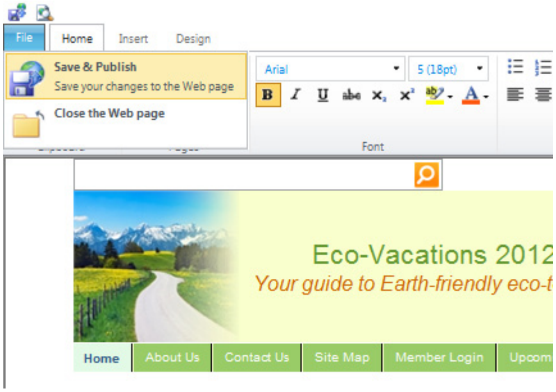

File
Home
Insert
Design
Save & Publish
Save your changes to the Web page
Close the Web page
Arial
5 (18pt)
Font
Eco-Vacations 2012
Your guide to Earth-friendly eco-t
Home
About Us
Contact Us
Site Map
Member Login
Upcom

FIGURE 12-21 Click the File tab, and click Save & Publish to publish your site.

When you're ready to close the website and return to your Office 365 site, click the File tab again and choose Close The Web Page. Back in the webpage listing, you can click Home to return to your Office 365 Home page.

What's Next

In this chapter, you took a whirlwind tour through all the web features available in Office 365. As you can see, you have many tools for designing your site, adding content, formatting text and pictures, adding gadgets, and optimizing your site for better placement in search engines. The next chapter closes out the book by offering examples of the ways you can use various tools together to manage collaborative projects and reach your team goals with Office 365.

CHAPTER 13

Integrating All Parts of Office 365

IN THIS CHAPTER:

- Using it all together—online and off
- Getting Productive with Office 365
- Creating an annual report
- Tracking a sales promotion
- Preparing an online training module

THROUGHOUT THIS BOOK, you've looked closely at the various elements of Office 365. After exploring the online interface, you followed specific paths through administering your account, creating a team site, working with document libraries and workflows, using Office Web Apps, and using Microsoft Outlook and Lync to keep your team on the same page and communicating well.

This chapter shines a light on the big, overarching benefit of Office 365—how beautifully it all works together. Here you'll see some examples of how using the various elements of Office 365 together can help you work effectively with your teammates to accomplish tasks that are important for your team.

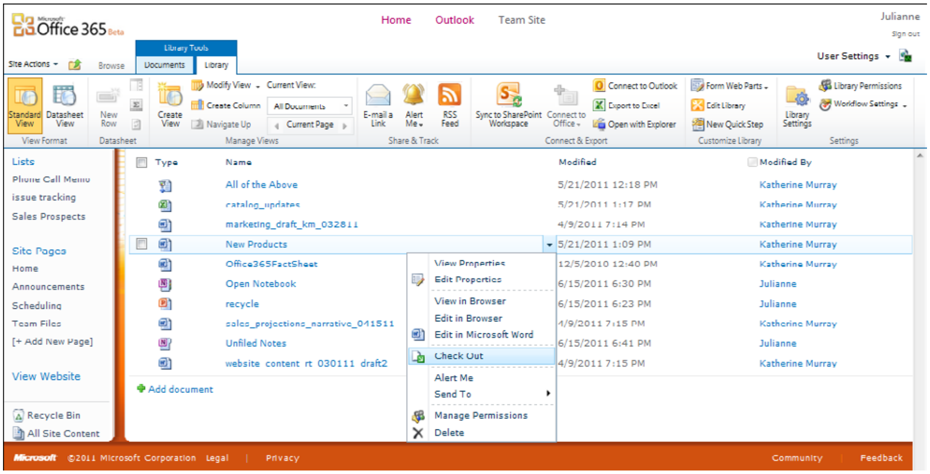
Using It All Together—Online and Off

One of the great benefits of cloud technology in all its forms is how easy it is to work on your files and stay in touch no matter where you might be working or how you're accessing the web. And even though the idea is to keep the files in the cloud so that you and your teammates can get to them easily, you can also download and work with versions of your projects while you're offline and then sync the files with the site when you log on next time.

Checking a File Out of Your Document Library

When you want to download a file and work on it on your computer—or phone—follow these steps:

1. Log in to Office 365.
2. Display your SharePoint team site.
3. Go to your document library.
4. Click the arrow of the file you want to work on, and click Check Out. (See Figure 13-1.)


Office 365 Beta
Home
Outlook
Team Site
Julianne
Sign out
User Settings
Site Actions
Browse
Library Tools
Documents
Library
Standard View
Datasheet View
View Format
New Row
Datasheet
Create View
Modify View
Create Column
Navigate Up
Current View:
All Documents
Current Page
Manage Views
E-mail a Link
Alert Me
RSS Feed
Share & Track
Sync to SharePoint Workspace
Connect to Office
Connect to Outlook
Export to Excel
Open with Explorer
Connect & Export
Form Web Parts
Edit Library
New Quick Step
Customize Library
Library Settings
Library Permissions
Workflow Settings
Settings
Lists
Phone Call Memo
issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
View Properties
Edit Properties
View in Browser
Edit in Browser
Edit in Microsoft Word
Check Out
Alert Me
Send To
Manage Permissions
Delete
Add document
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback

Type	Name	Modified	Modified By
	All of the Above	5/21/2011 12:18 PM	Katherine Murray
	catalog_updates	5/21/2011 1:17 PM	Katherine Murray
	marketing_draft_km_032811	4/9/2011 7:14 PM	Katherine Murray
	New Products	5/21/2011 1:09 PM	Katherine Murray
	Office365FactSheet	12/5/2010 12:40 PM	Katherine Murray
	Open Notebook	6/15/2011 6:30 PM	Julianne
	recycle	6/15/2011 6:23 PM	Julianne
	sales_projections_narrative_041511	4/9/2011 7:15 PM	Katherine Murray
	Unfiled Notes	6/15/2011 6:41 PM	Julianne
	website content rt 030111 draft2	4/9/2011 7:15 PM	Katherine Murray

FIGURE 13-1 You can check out a file to open a private copy and keep the file from being edited while you're working on it.

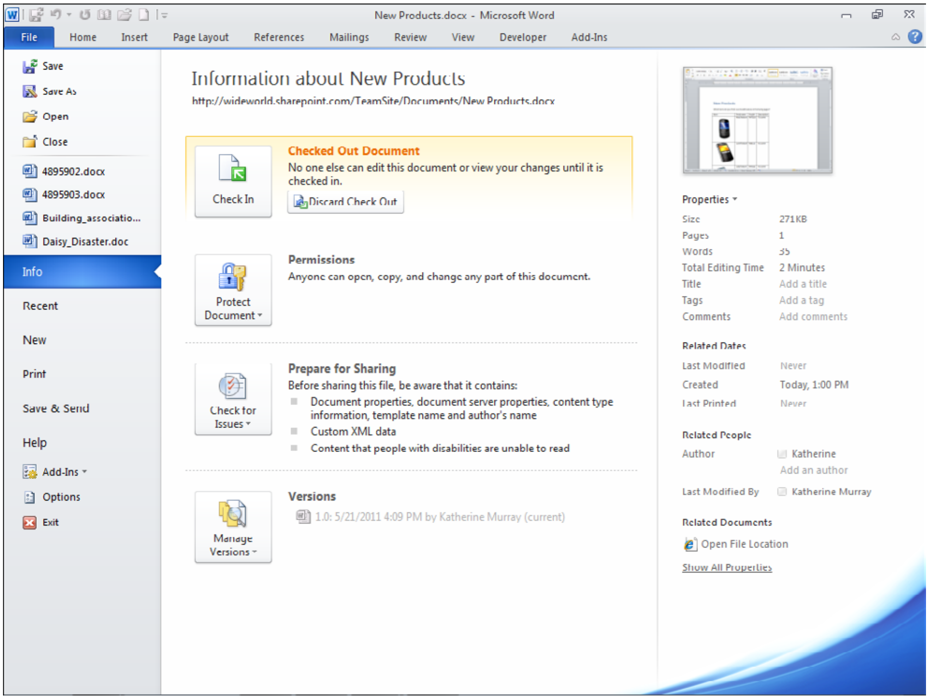
The file is now checked out as a private file for you to edit. Others won't be able to make changes to the file while it is checked out. When you're ready to return the file to the site—and make it available so that others can work on it—you can check it back in.

Checking a File in After You're Done Working on It

You can also check in a file after you've been working on it in the application. When you check in the file, it lets the server know that your changes have been saved and the file is ready to be edited by others. Here's how to check a file in:

1. Click the file you want to work with, and open it in the application used to create it.

2. Click the File tab.
3. In the Info tab, click Check In. (See Figure 13-2.)


New Products.docx - Microsoft Word
File
Home
Insert
Page Layout
References
Mailings
Review
View
Developer
Add-Ins
Save
Save As
Open
Close
4895902.docx
4895903.docx
Building_associatio...
Daisy_Disaster.doc
Info
Recent
New
Print
Save & Send
Help
Add-Ins
Options
Exit
Check In
Discard Check Out
Protect Document
Check for Issues
Manage Versions
Properties
Related Dates
Related People
Related Documents
Open File Location
Show All Properties

Information about New Products

http://wideworld.sharepoint.com/TeamSite/Documents/New Products.docx

Checked Out Document

No one else can edit this document or view your changes until it is checked in.

Permissions

Anyone can open, copy, and change any part of this document.

Prepare for Sharing

Before sharing this file, be aware that it contains:

- Document properties, document server properties, content type information, template name and author's name
- Custom XML data
- Content that people with disabilities are unable to read

Versions

1.0: 5/21/2011 4:09 PM by Katherine Murray (current)

Size	271KB
Pages	1
Words	35
Total Editing Time	2 Minutes
Title	Add a title
Tags	Add a tag
Comments	Add comments
Last Modified	Never
Created	Today, 1:00 PM
Last Printed	Never
Author	Katherine Add an author
Last Modified By	Katherine Murray

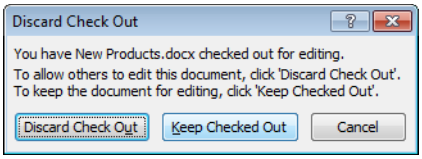
FIGURE 13-2 After working on a file you've checked out, you can return it to free use in the document library by clicking Check In.

After you check in the file, it becomes available in your SharePoint document library again so that others can open and edit the file as normal.

Saving Files to Your Computer

When you want to take a file offline so that you can work on it on your computer or your mobile device, you can simply open the file and then use Save As to save it to your computer or device. Choose a folder where you'll be able to find the file easily when you're ready to add it back to the site—for example, you could store it in your Downloads folder, or in a folder named for the shared project you're working on.

If you have already checked out the file, when you save it, Office 365 will remind you that the file is checked out to you and ask you whether you want to cancel the check-out status or keep the file checked out. If you want to keep others from being able to make changes to the file while you're working on it, choose Keep Checked Out. If you want others to be able to edit the file, click Discard Check Out.



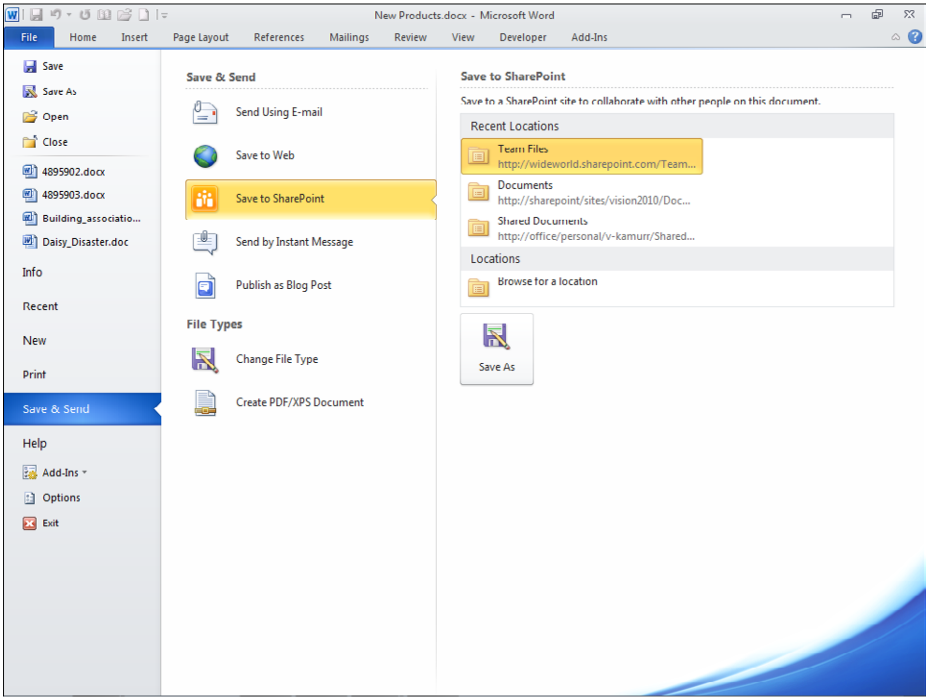
You have New Products.docx checked out for editing.
To allow others to edit this document, click 'Discard Check Out'.
To keep the document for editing, click 'Keep Checked Out'.

Tip

Saving Files to Your Document Library

After you make any necessary changes to the file offline, you can easily save your updated version of the file back to your team's document library. Here are the steps for saving the file back to the site:

1. In the application you are using (Word, Excel, PowerPoint, or OneNote), with the file open on the screen, click the File tab.
2. Click Save & Send.
3. Click Save To SharePoint.
4. Click the folder that represents your SharePoint document library. (See Figure 13-3.)


New Products.docx - Microsoft Word
File
Home
Insert
Page Layout
References
Mailings
Review
View
Developer
Add-Ins
Save
Save As
Open
Close
4895902.docx
4895903.docx
Building_associatio...
Daisy_Disaster.doc
Info
Recent
New
Print
Save & Send
Help
Add-Ins
Options
Exit
Save & Send
Send Using E-mail
Save to Web
Save to SharePoint
Send by Instant Message
Publish as Blog Post
File Types
Change File Type
Create PDF/XPS Document
Save to SharePoint
Recent Locations
Team Files
http://wideworld.sharepoint.com/Team...
Documents
http://sharepoint/sites/vision2010/Doc...
Shared Documents
http://office/personal/v-kamurr/Shared...
Locations
Browse for a location
Save As

Save to a SharePoint site to collaborate with other people on this document.

FIGURE 13-3 Choose Save To SharePoint, and select your document library to save the file back to the site.

Tip

Getting Productive with Office 365

Of course, Office 365 is much more than just a way to manage files that you'll work on in a team. As you've seen throughout this book, you can use the various tools in Office 365 to

- Create a shared team site for your group to gather and share documents and tasks as you collaborate on projects.
- Provide email and calendar tools to help you communicate and schedule meetings and events.
- Access Office Web Apps so that you can work on your files from any point you have web access.
- Offer secure instant messaging and online meetings for your group.
- Design and manage a public-facing website for clients and prospective customers.

Using these different tools together gives you a comprehensive way to manage your team and your tasks in the cloud. The sections that follow offer several examples of the way you can use the various elements of Office 365 to complete specific business-critical projects.

Creating an Annual Report

An annual report is an important tool that communicates to those interested in your business or organization how you have fared during the past year. The general idea is to present things in a positive light, showing examples of tasks you've mastered, obstacles you've overcome, and markets you've grown into.

Thinking Through Your Content

People who read your annual report might be your stockholders, investors, or donors—often they are people who have a vested interest in what you're doing, which means you need to aim for quality. A good annual report might include the following information:

- An introduction from the CEO or president of the board
- An overview of the year
- Specific sections about new products or services
- A section about new capital improvements to your facility

- Biographies or introductions for new staff members
- A financial section that explains sales results and projections
- A brief history of your organization
- Expectations for the coming year

Planning for Production

After you know what types of content you want to be included in the report, think through how you plan to deliver it. Will you produce a PDF to hand out at a company meeting? Do you want the PDF to be available as a download from your Office 365 public website?

Do you want to create a PowerPoint presentation of the report—or at least relevant sales data—to make available online or to show during the meeting?

The ways in which you distribute the information you create will largely be determined by the tools you use to prepare it. You can use Word to create a PDF, PowerPoint to create a presentation, and OneNote to collect your team notes along the way.

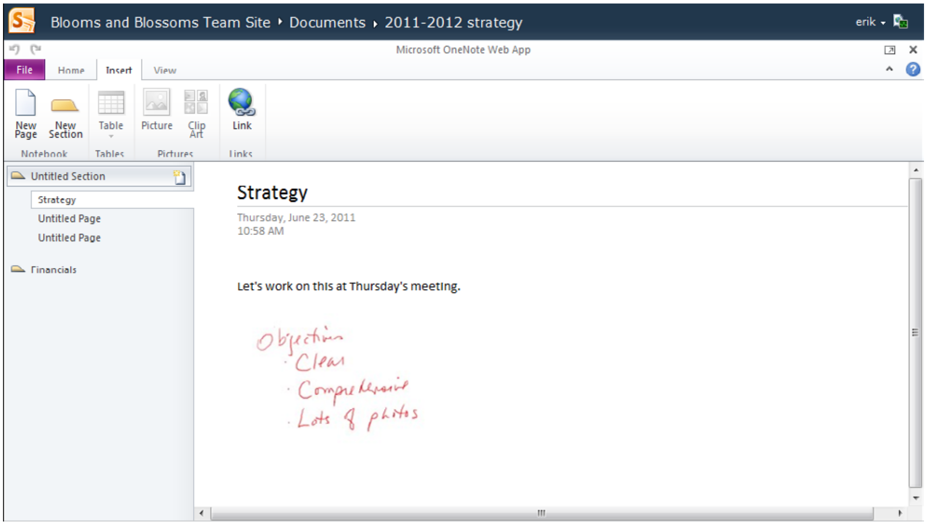
How Office 365 Helps Facilitate the Process

The tools in Office 365 will help you in many different ways as you pull together the various pieces for this project. One of the first things you need to do, of course, is choose a deadline that gives you the time you need to complete the project and leaves enough time for you to correct anything that goes wrong before the report needs to go out.

You can also decide who you want to be on the report team and make sure they have the necessary licenses to work with the various programs in Office 365.

After you identify your team and decide on a deadline, you're ready to begin the actual day-to-day work. The following list provides some ideas for ways you can use the tools in Office 365 to complete your annual report:

- **Use OneNote to start your brainstorming** Create a OneNote notebook to store team ideas as you think through things you'd like to include in the report. You can share the notebook online through OneNote Web App and make it available in the SharePoint document library you create. (See Figure 13-4.)
- **Create a SharePoint page for the annual report project** You can create a dedicated page where you can post announcements, questions, files, calendars, and other content related to the annual report project.


Blooms and Blossoms Team Site ▸ Documents ▸ 2011-2012 strategy
erik
Microsoft OneNote Web App
File
Home
Insert
View
New Page
New Section
Notebook
Table
Tables
Picture
Clip Art
Pictures
Link
Links
Untitled Section
Strategy
Untitled Page
Untitled Page
Financials

Strategy

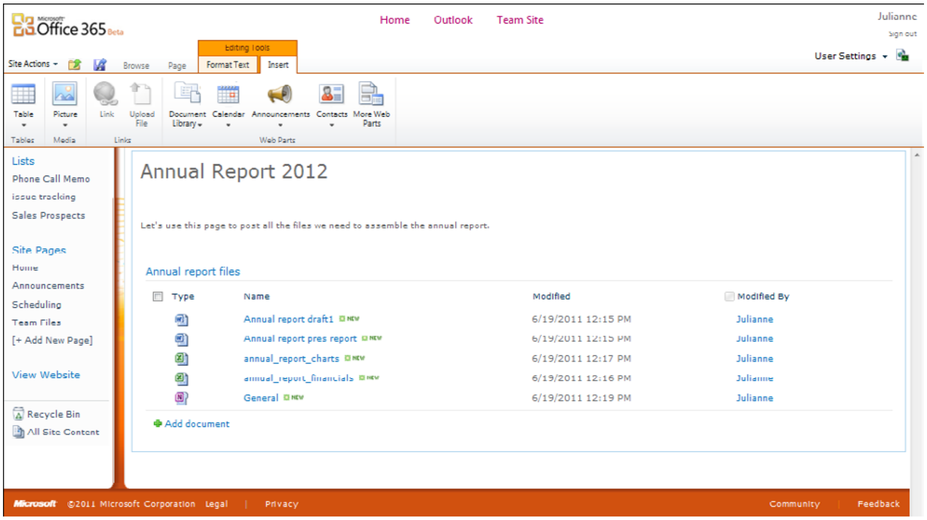
Thursday, June 23, 2011
10:58 AM

Let's work on this at Thursday's meeting.

Objectives
· Clear
· Comprehensive
· Lots of photos

FIGURE 13-4 Create a shared OneNote notebook to gather your thoughts as your team begins to brainstorm about the report project.

- **Create a document library for the files you'll use in the report** This makes it easy to find just what you need for this project without browsing through a collection of files used for other things. (See Figure 13-5.)


Microsoft Office 365 Beta
Home
Outlook
Team Site
Julianne
Sign out
User Settings
Site Actions
Browse
Page
Editing Tools
Format Text
Insert
Table
Picture
Link
Upload File
Document Library
Calendar
Announcements
Contacts
More Web Parts
Tables
Media
Links
Web Parts
Lists
Phone Call Memo
Issue tracking
Sales Prospects
Site Pages
Home
Announcements
Scheduling
Team Files
[+ Add New Page]
View Website
Recycle Bin
All Site Content
Microsoft ©2011 Microsoft Corporation Legal | Privacy
Community | Feedback

Annual Report 2012

Let's use this page to post all the files we need to assemble the annual report.

Annual report files

☐ Type	Name	Modified	Modified By
	Annual report draft1 NEW	6/19/2011 12:15 PM	Julianne
	Annual report pres report NEW	6/19/2011 12:15 PM	Julianne
	annual_report_charts NEW	6/19/2011 12:17 PM	Julianne
	annual_report_financials NEW	6/19/2011 12:16 PM	Julianne
	General NEW	6/19/2011 12:19 PM	Julianne

Add document

FIGURE 13-5 Add a new page and a document library for this specific project so that you have everything you need on one page.

- **Add a workflow to track report progress** Adding a workflow for the report helps you assign specific tasks and roles for accomplishing the goal, and it helps you to coordinate everyone's efforts.
- **Assign tasks for different aspects of the report** By doing this, you know who is doing what and you can tell where you are in the process by seeing who has completed the tasks assigned to them.
- **Host weekly team meetings in Lync to talk about the report progress** Keeping everybody moving ahead in the process—as a team—is an important part of an overall successful effort. Weekly meetings help the whole team keep track of how things are developing and give you a sense early on of where the trouble spots are.
- **Begin content creation in Microsoft Word** Open your OneNote notebook, and drag notes you need into your Word document draft. Share the file with others so that all team members can add the content they are responsible for adding.
- **Create worksheet data in Excel** You can add worksheet information—including sales figures, new hires, capital expenditures, and foundation donations—in an Excel worksheet. You might also want to create charts that showcase data and place them in the same file, perhaps on a different worksheet. You can link the worksheet data to your Word draft to ensure that the most current data is reflected in the report.
- **Spotlight sales data with PowerPoint slides** You might want to create a short sales presentation in PowerPoint and include those slides as illustrations in the financial pages of the annual report. You can also give the presentation in the annual meeting if you have a speaking spot on the meeting's agenda.

Tracking a Sales Promotion

Often sales promotions are launched and tracked by the folks behind the scenes—or the sales manager or staff—without a lot of company fanfare or communication. But especially if you want your whole group to feel the effects of the promotion (there's a boost of energy, after all) and understand how increases in sales benefit the whole lot of you, it's a good idea to think through your promotion as a way to raise goodwill and enthusiasm companywide.

Thinking Through Your Approach

Your sales promotion might be a small project—just some strategy, a worksheet, and some promotional material for your salespeople—or it might be a bigger event, with updates on your website, blurbs for the company newsletter, and charts and progress reports along the way.

What would you like to accomplish from your promotion? And how will you let people know? Do you want a print component as well as an online piece? Will you be sending out email updates? Walk through your whole strategy from start to finish, and envision the number of people it will involve to prepare the event and pull it off.

Planning for Production

Planning for the way you want to support your sale promotion involves thinking through the process from start to finish. For example, you'll need to work through the following considerations.

What will you use to let everybody know about the promotion? Think "materials" here. For example, you might want to create an internal web page where salespeople can go for more information. Send out a broadcast email to the team introducing the new promotion and linking back to the internal web page.

You might also create some promotion rules that participants can download in PDF format, create some sample sales data in Excel, whip up a few charts to show the kinds of results you're hoping for, and design a brochure that showcases the items salespeople can win as a result of the promotion.

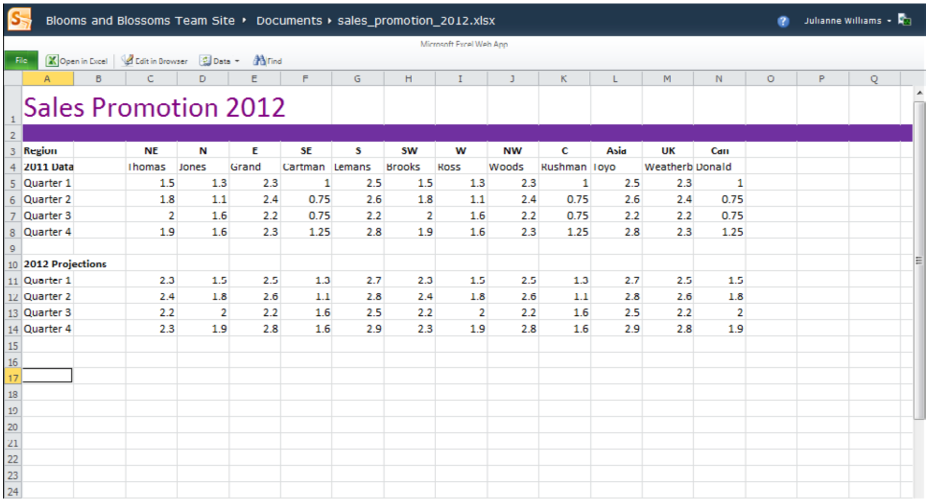
You could also create flyers to post in shared places like around the water cooler or coffeemaker, or if your office is completely virtual, you could post announcements on your team site with links to the website for more information.

How Office 365 Can Help with Your Sales Promotion

There are as many different ways to organize a sales promotion as there are sales promotions, but the tools in Office 365 can help you think through your approach and put pieces in place to track sales information and share successes with your team. You can use Word, Excel, PowerPoint, and OneNote, and create pages on your team site to help everyone get access to the same information. Here are a few examples:

- **Draft your promotion strategy in Word** Working with your team, create and share a Word document that includes your play-by-play strategy for the sales promotion. Be sure to include the contact information for key people on the team, as well as a timeline for the full execution of the promotion.

- **Crunch the numbers in Excel** What kinds of sales results are you hoping for? What are the ideal numbers you'd like to get in different regions? Do you want to increase a specific type of sales in one area but encourage other sales in different regions? If so, think through how your promotion can help encourage the types of growth you'd like to see in your sales staff. Put some real numbers in the worksheet as your ideals so that you know what you're aiming for. Set your sales goal—even if that number is known only to your top management team—before the promotion begins. (See Figure 13-6.)
- **Links to other sales worksheets and regions** Another consideration, if you want to make sure your sales data is live and up to date, involves linking the sales reports to the actual sales data as it comes in. You can do this by linking an Excel worksheet to your Word document or by creating a link in your sales promotion worksheet to other sales worksheets used for the various regions you're tracking.
- **Include your progress in PowerPoint presentations, and make those available on your team site** Keep people in sync with your progress by sharing the good news as it unfolds. Create a PowerPoint presentation, and add it to your team site. That way you can post the slides, with updated sales data, to your team site so that everyone can see the progress that's being made (and perhaps feel inspired to try a little harder next week themselves).



Sales Promotion 2012

Region	NE	N	E	SE	S	SW	W	NW	C	Asia	UK	Can
2011 Data	Thomas	Jones	Grand	Cartman	Lemans	Brooks	Ross	Woods	Rushman	Toyo	Weatherb	Donald
Quarter 1	1.5	1.3	2.3	1	2.5	1.5	1.3	2.3	1	2.5	2.3	1
Quarter 2	1.8	1.1	2.4	0.75	2.6	1.8	1.1	2.4	0.75	2.6	2.4	0.75
Quarter 3	2	1.6	2.2	0.75	2.2	2	1.6	2.2	0.75	2.2	2.2	0.75
Quarter 4	1.9	1.6	2.3	1.25	2.8	1.9	1.6	2.3	1.25	2.8	2.3	1.25
2012 Projections												
Quarter 1	2.3	1.5	2.5	1.3	2.7	2.3	1.5	2.5	1.3	2.7	2.5	1.5
Quarter 2	2.4	1.8	2.6	1.1	2.8	2.4	1.8	2.6	1.1	2.8	2.6	1.8
Quarter 3	2.2	2	2.2	1.6	2.5	2.2	2	2.2	1.6	2.5	2.2	2
Quarter 4	2.3	1.9	2.8	1.6	2.9	2.3	1.9	2.8	1.6	2.9	2.8	1.9

FIGURE 13-6 Create a worksheet with sales data and projections as you prepare for your sales promotion.

Preparing an Online Training Module

If your team—or perhaps your entire company—works remotely in the cloud, one of the challenges you might face is making sure everyone is trained in a similar way for common business procedures. For example, if you're using a specific kind of issue-tracking software, how do you teach your employees to use it? Or does everyone in your customer service department know how to report fulfillment problems? You can develop online training modules to make sure that your team has access to the knowledge they need to complete their business-critical tasks.

Thinking Through Your Training

Envisioning the type of training you need is an important part of designing a module that hits the mark. There are a number of questions you can ask here, including the following:

- Who will be using the training module?
- Will they have access to the web?
- Will they be able to call in for a conference call while watching a presentation?
- Do you want the training to be self-directed so that participants can work through it on their own?
- Do you want any kind of evaluation method at the end of the training?
- How will you know who has completed the training?

Planning for Production

As in the prior example, way you deliver the training will be largely determined by the type of content you create. If you design your learning module in PowerPoint, for example, you can add audio as a voiceover to give instructions as the participant clicks through the slides. You can also include video to demonstrate key processes.

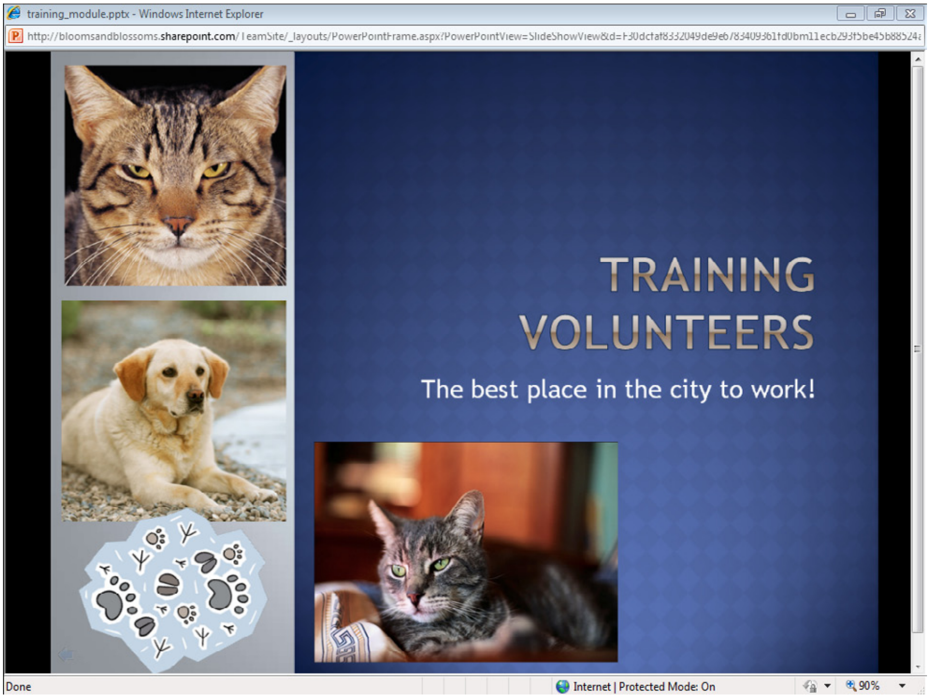
You cannot, however, use PowerPoint's broadcast feature (new in PowerPoint 2010) to broadcast a presentation complete with sound and video. For now, the broadcast feature supports slides only.

You could create your learning module in a web page on your site and include a mix of documents and presentations. For example, the participant could read an introduction, open a word file to do an exercise, watch a video clip or presentation to learn more, and log their time and email in an Excel worksheet.

How Office 365 Can Help with Your Online Training

One great way to approach training—especially if you think you might do a lot of it—is to create a Training page on your team site. On this page, you could add subpages with a focus on different training modules: Sales, Technology, New Hires, and so forth. After you have an overall idea of your training program in mind, you can get to work using Office 365 to create the pieces. Here are other ideas:

- **Get your team together to brainstorm in Lync** Online training can be a fun, creative project that includes the talents and interests of many people on your team. Create an online meeting in Lync, and invite your team to a whiteboard brainstorming session. You can all talk about what you'd like to see in the training and identify the training goal as well as your primary objectives.
- **Outline the process in a Word document or OneNote notebook** The idea here is to give yourself space to identify all the important steps as you begin to pull together the content for the training.
- **Use Word to draft a document of your training content** Focus first on the outline and the content you want to convey; add illustrations as needed (or create a separate file or folder on your SharePoint site for photos you want to use).
- **Use your OneNote notebook to collect research you will use as the basis for your training** Be sure to include full resource citations and links if appropriate.
- **Build a prototype of your training in PowerPoint** As a first draft, you can include the content and photos (or video clips) your participants will see. (See Figure 13-7.) Share the draft with your team, and use Lync to get together and talk about the draft.
- **Save as a broadcast, and save as video** If the training module you create is not interactive but walks the participant through a process with audio and video, you can save the presentation as a video clip and post it to your team site.
- **Use Word to create an assessment tool** This helps participants see what they learned and let you know what they thought about the training module.
- **Make handouts and tip sheets available on the training page** If you do this, participants can download additional information if they want to review the content that was covered.


training_module.pptx - Windows Internet Explorer
http://bloomsandblossoms.sharepoint.com/TeamSite/_layouts/PowerPointFrame.aspx?PowerPointView=SlideShowView&d=F30dcfaf8332049de9eb7834093b1fd0bm11ecb293f5be45b88524
Done
Internet | Protected Mode: On
90%

TRAINING VOLUNTEERS

The best place in the city to work!

FIGURE 13-7 Create a prototype of your training module in PowerPoint.

Happily Ever After…in the Cloud

In this chapter—and throughout this book—you've been invited to think about how Office 365 can help you and your team reach your goals, whether you work in the same office building or you are scattered across the globe. Yesterday's water cooler has become today's Lync chat, and the old processes we used to follow—mailing reports, making long-distance phone calls, flying to meetings—have been replaced (thankfully) with lower-cost, lower-impact options.

Today, using the tools in Office 365, you can build a connected and motivated team that has everything it needs to complete quality projects, anytime and anywhere.

Good luck, and keep finding new ways to be creative and stay in sync with Office 365!

APPENDIX A

Extras for Great Teams

EVERY GROUP is different, just like every cloud is different. So it logically follows that every group in every cloud will be different. One thing that all groups share, however, is that to accomplish the work they come together to complete, they need to have specific, measurable ways to assign tasks, track their progress, get their questions answered, and reach their goals.

This appendix offers ideas to help you organize and manage the overall flow of information in your site. These simple forms aren't meant to replace any of the electronic processes you can use in Office 365, of course. You can use workflows to automate your project review process, for example, or use Microsoft Lync to hold weekly meetings where you check in on various stages of your responsibilities.

But if you're just starting out organizing your team, you might find a few helpful ideas here for gathering your data and keeping it organized and easy to find in the cloud.

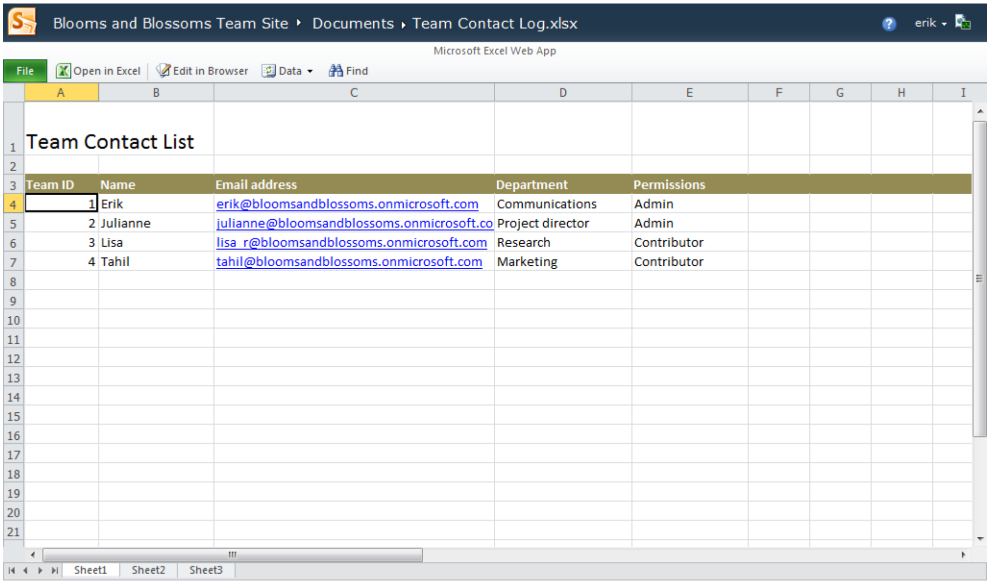
Thinking Through Your Group Process

Early in this book, you read about the basic steps of a group process—forming, storming, norming, performing, and adjourning. As you think through the various stages in your project, consider the type of information you want to track:

- What is the scope of your project?
- How long will the project last?
- What will the benchmarks of your project be?
- Will you set internal deadlines for the project? (For example, you might set a date that serves as a deadline for having 50 percent of the project completed.)
- What are the roles your members will perform?
- How will you stay in touch with each other (and with what frequency)?
- Will you use workflows to track your progress?
- How will you notify the team when a problem arises?
- How will plan changes be communicated?
- How will you assess the success of your group?

Team Contact List

You can reach all your team members though your contacts list in Lync and the Admin User page in Office 365, but you might also want to create a contact list with complete names, email addresses, site addresses, responsibilities, and more that you download and make available to the team. (See Figure A-1.)



Team Contact List

Team ID	Name	Email address	Department	Permissions
1	Erik	erik@bloomsandblossoms.onmicrosoft.com	Communications	Admin
2	Julianne	julianne@bloomsandblossoms.onmicrosoft.co	Project director	Admin
3	Lisa	lisa_r@bloomsandblossoms.onmicrosoft.com	Research	Contributor
4	Tahil	tahil@bloomsandblossoms.onmicrosoft.com	Marketing	Contributor

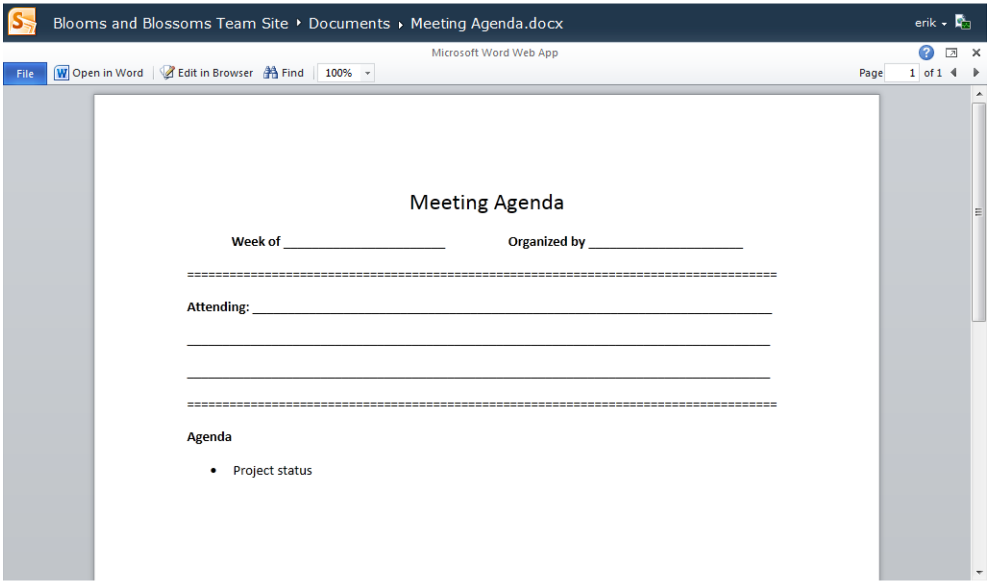
FIGURE A-1 You can create a contact log file so that you can view all user accounts and permissions at a glance.

Excel Worksheet with Licenses and Permissions

Office 365 keeps track of the licenses and permissions you assign to your team members. Depending on the programs you use and the version of Office 365 you've selected, you might have 25 licenses—or more—to assign. If you're working with a large team and want to make sure members have access only to the programs and services they need, you can use an Excel worksheet to manage and track the licenses you've assigned.

Meeting Agenda Template

Will you host team meetings regularly using Microsoft Lync Online? Lync makes it easy to chat and talk in real time, share programs, review progress, and more. You can help organize your team meetings and make sure they are effective by designing and distributing a meeting template members can use to add their own agenda items. Doing this can help you make sure everyone is on the same page. (See Figure A-2.)


Blooms and Blossoms Team Site ‣ Documents ‣ Meeting Agenda.docx
erik
Microsoft Word Web App
File
Open in Word
Edit in Browser
Find
100%
Page 1 of 1

Meeting Agenda

Week of ____________________ **Organized by** ____________________

==

Attending: ____

____

____

==

Agenda

- Project status

FIGURE A-2 Design a meeting agenda to circulate among team members as you prepare for your weekly meetings.

Tips for Your Team Site

The team site you design in SharePoint is your first resource for all the latest information about your project. Think through your team site so that it accomplishes several information goals and makes things easier on your team. Keep the following suggestions in mind:

- The home page of the team site should list all the most recent update information about your project. Which pieces have been completed? What's next on the schedule? Who is running the meeting next week?
- Secondary pages of your team site should be organized so that their function is clear. One page might be your document library for content; another might be a library for pictures. Another page might include presentation files or video clips, marketing ideas, or event plans.
- Include announcements and notes on your team site to keep your team informed about the latest happenings on your project.

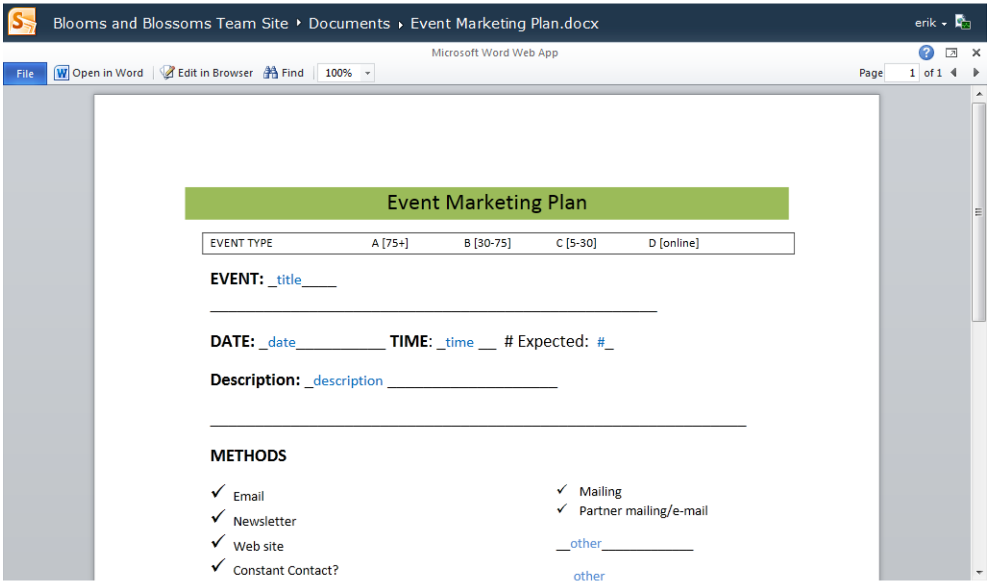
Proposal Checklist

Depending on the type of proposals you prepare—sales proposals, grant proposals, book proposals, or others—the type of information you gather might vary from project to project. As you create a checklist to help you organize the various pieces of the project, consider the following items:

- Who is the proposal for? (Be sure to include all contact information for whomever you put on this list.)
- What type of proposal are you creating?
- When is the proposal due?
- Which departments does it involve?
- How long does the proposal need to be?
- Can you include any elements written previously in other proposals?
- How will the proposal be delivered?
- Who will work on the proposal?
- Have you created an Office 365 workflow to track proposal progress?

Marketing Checklist

A marketing checklist is another tool that can help you think through and plan your efforts. Include on your marketing list the contact info of all team members who work with marketing content, and then plan the ways you want to promote your product, event, or service. Identify the key pieces of information. For example, if you're planning a marketing event, you might want to record information such as the number of people you expect to attend your event, the type of venue you need to rent, the production costs, and so forth. Then devise a form to contain this information that you can make available in a document library on the team site. (See Figure A-3.)


Blooms and Blossoms Team Site ▸ Documents ▸ Event Marketing Plan.docx
erik
Microsoft Word Web App
File
Open in Word
Edit in Browser
Find
100%
Page 1 of 1

Event Marketing Plan

EVENT TYPE	A [75+]	B [30-75]	C [5-30]	D [online]

EVENT: _title_____

____

DATE: _date___________ **TIME:** _time __ # Expected: #_

Description: _description ____________________

____

METHODS

- ✓ Email
- ✓ Newsletter
- ✓ Web site
- ✓ Constant Contact?
- ✓ Mailing
- ✓ Partner mailing/e-mail

__other____________

other

FIGURE A-3 Plan the ways you want to spread the word about a product, event, or service, and create a form to capture key details of your plan.

Index

A

account, Office 365, creating, 17–19
Add A Domain link, 56
Add Document link, 120
address book, adding external contacts, 60–61
adjourning stage of team life cycle, 81
Admin link, 45
Admin Overview page, 45–46
    Admin Shortcuts, 46
    Assign User Licenses, 71
    Distribution Groups tab, 59
    Domains link, 55
    Edit Website link, 256
    Manage Team Sites link, 63
    Planned Maintenance, 75
    Service Health, 75
    Service Requests, 72
    Subscriptions area, 70
    Support Overview page, 71
    Users link, 47
Admin Shortcuts, 46
administrators, 10–11, 43–44
    contacts, adding, 15
    domain properties, displaying, 55–57
    Exchange, setting up, 57–62
    help and support system, 71–75
    Location information, setting, 234
    Lync Online, configuring, 67–69
    multiple administrators, 44
    Outlook, setting up, 57–62
    password management, 54–55
    public website creation and management, 256–278
    service requests, creating, 72–74
    SharePoint Online tasks, 62–66
    site theme management, 101
    subscriptions management, 70–71
    system status, checking, 72, 74–75
    tasks of, 45–46
    upload size management, 159
    user account management, 25
    users, adding and managing, 47–55
    websites, editing, 93
Advanced Search tools in Outlook, 213
alerts. *See also* notifications
    for contact status changes, 241–243
    for Lync calls, 248
    setting in SharePoint Online, 136
Amazon cloud outage, 10
announcements, 296
    sharing, 85
annual reports
    creating, 284–287
anti-spam protection, 9
antivirus protection, 9
Apple devices
    Office 365 compatibility, 178
applications
    web-based, 6
appointments. *See also* Calendar
    adding to Calendar, 219–220
    creating, 220
audio
    for broadcast presentations, 93
    for meetings, 90
    setting up for video calls, 234–235
    for training modules, 290
audio conferencing, 69
autogenerated passwords, 53
    changing, 54–55

B

backgrounds for websites, 259
Basic Table library style, 127
benchmarks, setting up, 80

Bing search box, adding to websites, 258
Blocks Contacts privacy setting, 240
broadcasting
  audio component, 93
  collateral materials, 93
  presentations, 92–93, 199, 290
  tips for, 92–93
bulleted lists, adding to public websites, 266–267
business services, 36–41

C

Calendar
  appointments, adding, 219–220
  appointments, creating, 220
  I Want To Request Permission To View The Recipient's Calendar Folder option, 222
  main window, 218–219
  scheduling meetings with, 90
  shared calendars, displaying, 223
  sharing, 86–88, 221–223
  time zone information, 88
  views, changing, 220
  working with, 218–223
cascading style sheets (CSSs), adding to public websites, 266
Change Picture tool, 108
charts in Excel Web App, 168
Check Messages tool, 205
checking in/out files, 134–135, 280–281
  Use My Local Drafts Folder option, 282
Choose Page Properties dialog box, 277
cloud computing, 3
  adoption of, 7–8
  benefits of, 7, 279
  contact challenges, 81–94
  functions of, 7–8
  resource conservation, 6
cloud services, 26
co-authoring, 165–168
Colleagues privacy setting, 240
color schemes
  for public websites, 263–264
  for team sites, 99–101
comments, adding on mobile devices, 185–187
communicating in real time, 232, 236, 254. *See also* instant messaging; Lync 2010; video calls
Community links, 21
computer, saving files to, 281–282
Connected Accounts, 61
contact cards, 244–245
contact log files, 295
Contact Me About area, 24
contact requests, accepting, 239
contacts
  adding, 224–225
  adding information for, 225
  adding new, 15
  adding to Lync, 236–237
  calling, 15, 248–250
  contact cards, 244–245
  contact groups, creating, 237–238
  contact requests, 239
  displaying, 224
  importing, 225–226
  instant contacts, 89–90
  online status alerts, 241–243
  in Outlook Web App, 224–227
  presence icons, 12
  presence indicators, 244
  privacy levels for, 239, 240–241
  searching for, 226–227
  sharing files, folders, and programs with, 250–254
  tagging, 241–242
  working with in Lync, 236–245
contacts list
  presence indicators, 244
  for team members, 294–295
  views of, 243–244
content
  adding to team site, 110–113
  text layout styles, 102
  translating on the fly, 88–89, 113
Conversation History folder, 247
conversations. *See also* instant messaging
  group conversations, 253–254
  transcripts of, 247
Conversation view in Outlook, 208
Create Column dialog box, 128
Create List dialog box, 119
Create Web Page dialog box, 271–272

CSV files
  adding users from, 49
  creating and uploading, 50–51
  importing in Outlook Web App, 226
culture, effect on working in teams, 6

D

data replication, 9
desktop
  saving files to, 281–282
  sharing, 251–252
desktop applications, working with files in, 163–165
dial-in conferencing, setting up, 68–69
disaster recovery, 9
display language, changing, 24
display names, 49
distribution lists, creating, 59–60
Document Details library style, 127
document libraries
  accessing from mobile phones, 180–181
  alerts, setting, 136
  columns, adding, 126, 128
  creating, 119–122
  current view, modifying, 124–127
  datasheet view, 129
  documents, adding to, 120–122
  documents, sorting, 123, 126
  documents, starting new, 132–133
  files, checking in and out, 280–281
  files, filtering, 126
  files, saving to, 282–283
  folders, adding, 132
  managing, 84–85
  naming, 120
  organizing, 122–130
  Overwrite Existing Files option, 122
  pages, adding, 119
  planning, 118
  for specific projects, 286
  styles, choosing, 126–127
  Use My Local Drafts Folder option, 134–135, 282
  views, adding new, 129–130
  views, switching, 130
document library files
  action choices, 131
  adding to library, 120–122
  checking in and checking out, 134–135
  filtering, 126
  properties, viewing, 133–134
  sorting, 123, 126
  working with, 130–136
Document Library list, 120
documents. *See also* document library files; files
  adding to document libraries, 120–122
  co-authoring, 165–168
  comments, adding on the go, 185–187
  dragging notes into, 287
  editing on mobile devices, 182–190
  organizing, 122–130
  saving on mobile devices, 189–190
  sending from mobile devices, 190
  sharing, 39–40, 84
  starting in SharePoint online, 132
  text formatting on the go, 187–189
  uploading to SharePoint Online, 133
domain names, purchasing, 56
domains
  adding, 56–57
  default domain name, 56
  definition of, 46
  displaying, 55–57
Doulton, Melanie, 6
Downloads link, 21
Downloads page, 28

E

Edit Dial-In Conference Settings window, 69
Edit tool, 84
editing
  in browser, 158, 162–163, 166–167
  comments, adding on the go, 185–187
  Excel worksheets on mobile devices, 190–194
  formatting text on mobile devices, 187–189
  in Microsoft Word, 158
  in Office Web Apps, 161–165
  page content, 110–113
  PowerPoint presentations on mobile devices, 196–198
  Word documents on mobile devices, 182–190

editing tools on mobile devices, 185–186
Editing Tools Format Text tab, 102, 110
Editing Tools Insert tab, 98
  Web Parts group, 113
email, 3
  checking, 204–218
  configuring, 58
  connecting to schedule and calendar, 37–38
  creating messages, 206–208
  distribution lists, 59–60
  with external contacts, 60–61
  filtering messages, 214–215
  folders for, 210–211
  Inbox Rules for, 215
  managing, 11–13, 204–218, 210–215
  migrating to cloud, 61–62
  moving messages, 211–212
  POP and IMAP email accounts, 36
  preferences, setting, 215–216
  receiving and sending on mobile phone, 175–178
  searching messages, 212–214
  setting up with Outlook 2010, 34
Email Migration tool, 62
Enterprise version. *See* Office 365 Enterprise
Excel 2010
  downloading snapshots of worksheets, 169
  linking to live data, 289
  on mobile devices, working with, 190–194
  worksheet data, creating in, 289
  worksheet data, entering in, 287
Excel Web App, 157
  Autosave feature, 152, 157, 158
  co-authoring in, 166
  worksheets, reviewing and editing in, 168–169
Exchange Online, 38, 58
  distribution lists, creating, 59–60
  External Contacts, 60
  Mailboxes feature, 58–59
  setting up, 57–62
expiration dates for posts, 104
Express Sites, 96–97
external communications
  with Lync, 237
  setting, 67–68
external contacts, adding, 60–61
External Contacts privacy setting, 240

F

failovers, automatic, 9
File Download – Security Warning dialog box, 29
file properties, viewing, 133–134
files. *See also* document library files; documents
  creating in Office Web Apps, 152, 154, 157–158
  downloading, 280
  editing in Web App, 39
  editing in Web browser, 158, 162–163
  naming conventions for, 122
  online and offline access to, 37
  protection features, 133
  saving online, 16
  saving to computer, 281–282
  saving to document library, 282–283
  sharing, 84
  size limitations, 159
  sorting in columns, 123
  synchronizing, 132
  syncing with server, 166
  versions, managing, 118, 122
  viewing in browser, 158, 161–162
  viewing in Office 365, 161–162
  working in desktop applications, 163–165
  working in Office Web Apps, 157–158, 158–159
filtering
  email, 214–215
  files in document libraries, 126
Firefox, 151
folders
  connecting SharePoint Online and Outlook folders, 132
  in document libraries, 132
  for email, 210–211
Format Text tab, 110
formatting
  text, 110–111
  text on mobile devices, 187–189
forming stage of team life cycle, 80–81
Friends And Family privacy setting, 240

G

gadgets, adding to public websites, 275–276
geo-redundant services, 10
Get Your Team Started area, 45

global teams
  cultural factors, 6
  needs of, 5
Grant Permissions dialog box, 63–64
greener solutions
  of cloud computing, 6
  of working virtually, 4
Group Conversation dialog box, 90–91
group process, thinking through, 294
groups in SharePoint, 66

H

hardware requirements for Lync 2010, 30–31
Header dialog box, 261
help system, 71–75
high-context countries, 6
highlighting text on mobile devices, 188
Home page, 10–11, 19–21
  Admin area, 10
  calendar access, 37–38
  inbox access, 37–38
  Install Your Office 2010 Professional Plus subscription link, 16
  Lync, 20
  More Gadgets section, 275
  new pages, creating, 85
  Office 365 icons, 20
  Outlook, 19
  Outlook area, 203–204
  Posts area, 103
  Resourcs column, 21
  Start here, 19
  Team site, 20
  Team Site, 13–14
  View tool, 257
  Web App icons, 152
  Website, 20
  Website area, 93
HTML list codes, 267
HTML markup styles, 112
HTML text sizes, 265
hyperlinks, adding to public websites, 267–268

I

IBM cloud computing survey, 7
icons, 20
Image Tools Format tab, 270
images
  adding to public websites, 269–271
  adding to team site, 105–108
  displaying on mobile devices, 182
  editing, 107–108
  optimizing, 259
  for website page background, 259
importing contacts, 225–226
Inbox. *See also* email; Outlook 2010
  Conversation view, 208
  displaying, 203
  folder list, 210–211
  reading pane, 204, 206, 223, 228
  search box, 212
  views, changing, 208–209
Inbox Rules, 215
information distribution, 285
information management tools, 293–298
Insert A Link dialog box, 267
Insert Image dialog box, 269
Install Your Office 2010 Professional Plus subscription link, 16
instant calls, 15. *See also* video calls
instant contact, 89–90
instant messaging, 40, 229–254
  inviting others to participate, 246
  participants, displaying, 246
  public messaging, 237
  security of, 89
  sharing communications, 90
  sharing desktop in, 251
  with team members, 245–247
  transcripts of conversations, 247
Internet Explorer Trusted Sites Zone, adding sites to, 135
invitations
  for Calendar sharing, 222
  for instant messaging, 246
  sending, 53–54
  to meetings, 217
  to team site, 115
Issue Tracking list, 139, 145
Issues Tracking list template, 138, 139

K

keywords for website descriptions, 277

L

language
  changing, 24
  coding text for, 112–113
  translation tools, 88–89
Languages tool, 112
layouts
  of team site pages, 101–103
  for websites, 93–94
Library Tools Documents tab, 130–131, 133
Library Tools Library tab, 124
licenses
  assigning, 52–53, 295
  reclaiming and reassigning, 53
  viewing, 70–71
life cycle of teams, 80–81
linking folders, 132
List Tools List tab, 103
lists
  adding to public websites, 266–267
  Issues Tracking list, 138, 139, 145
  workflows, adding to, 138
local time, setting, 88
location
  assigning, 51–52
  setting in Lync, 233–234
logos
  adding to public website, 262–263
  design of, 263
low-context countries, 6
Lync calls. *See* video calls
Lync Online, 28, 40
  configuring, 67–69
  dial-in conferencing, setting up, 68–69
  external communications, setting, 67–68
  instant contact with, 89
  online meetings with, 90
  user information, editing, 68
Lync Online Control Panel, 67
  User Information, 68
Lync 2010, 14–15, 229–254
  audio settings, 234–236
  brainstorming in, 291
  capabilities of, 230
  contact cards, 244–245
  contact privacy levels, 239, 240–241
  contact requests, 239
  contacts, tagging, 241–242
  contacts, working with, 236–245
  Conversation History folder, 247
  downloading, 15
  hardware requirements, 30–31
  installing, 28–31
  instant messaging, 245–247
  launching, 29
  location settings, 233–234
  main window, 232
  personal notes, adding, 233
  presence indicators, 231, 244–245
  presence settings, 231
  sharing programs and files with, 250–254
  signing in, 230–231
  sound and voice settings, 234–236
  starting, 230
  video calls, making, 248–250
  webcam check, 235
  Welcome To Lync Wizard, 234–235
  whiteboard sessions, 253–254

M

mail. *See* email
mail folders
  creating, 210–211
  moving messages to, 211–212
  searching in, 213
Make This Group A Security Group check box, 59
Mango Windows Phone operating system, 174
marketing checklist, 297–298
markup styles, applying, 112
meeting agenda template, 295–296
meeting requests, creating, 216–218
meetings, 90–91
  audio for, 90
  scheduling, 87
Member Login button on public websites, 258
Members group (SharePoint), 66
messages. *See also* email
  checking for, 205
  Conversation view of, 208

messages (*continued*)
  creating, 206–208
  filing automatically, 215
  moving, 211–212
  organizing in folders, 210–211
  reading, 206
  replying to, 206
  searching for, 212–214
messaging, online availability, 61
Microsoft Lync Sign In window, 230–231
Microsoft Lync 2010. *See* Lync 2010
Microsoft MVPs, 43
Microsoft Office Communicator 2007 R2, 230
Microsoft Office 365. *See* Office 365
Microsoft Office 365 Desktop Setup dialog box, 33
Microsoft Office 2010. *See* Office 2010
Microsoft Online Services ID, 19
Microsoft Silverlight, 155
migration from server-based mail to cloud address, 61–62
Mini Translator tool, 88–89, 113
mobile devices
  comments, adding to documents, 185–187
  editing tools on, 185–186
  editing Word documents on, 182–190
  Excel data on, 190–194
  highlighting text on, 188
  images, displaying on, 182
  Office 365 files on, 173–200
  PowerPoint presentations on, 195–199
  saving documents on, 189–190
  saving files to, 281–282
  sending documents from, 190
  setting up for Office 365, 35–36
  text formatting on, 187–189
  undoing and redoing actions, 186
Mobile Phone Setup Wizard, 36
mobile phones
  connecting to Office 365, 33–34
  email, receiving and sending on, 175–178
  Excel icon, 191
  Excel worksheets, editing and reviewing on, 190–194
  Lync calls on, 235
  Office Hub tile, 179
  Office 365 and, 173, 174–175
  touch gestures on, 180
  Web Apps on, 156
  Word documents, editing on, 183–185
mobile workforce, characteristics of, 4
More Web Parts tool, 114
multiple upload feature (SharePoint Online), 120–122

N

naming conventions for files, 122
navigation layouts for websites, 273–274
New Alert dialog box, 136
New Page dialog box, 109
Newsletter library style, 127
norming stage of team life cycle, 81
notebooks. *See also* OneNote
  authors, viewing, 170–171
  for brainstorming, 285
  notes, adding, formatting, and tagging, 170
  in OneNote Web App, 169–172
  password protecting, 171–172
  research, collecting in, 291
  sharing, 169
notes, posting to team site, 103–105
notifications. *See also* alerts
  contact requests, 239
  about workflows, 144, 147
numbered lists, adding to public websites, 266–267

O

Office Hub, 156
  adding to phone start page, 179
  team site, accessing from, 180
  on Windows 7 phones, 179–181
Office Live for Small Business, 255
Office Live Small Business (OLSB), 27, 94
Office 365
  annual reports, creating with, 284–287
  Apple device compatibility, 178
  characteristics of, 5
  co-authoring with, 165–168
  countries supported, 31, 51–52
  device access, 9
  extras, 293–298

Office 365 (*continued*)
  features of, 8–16
  file sizes, 159
  files, viewing in, 161–162
  gadgets, 275–276
  getting ready to use, 28–36
  help, 71–75
  Home page, 10–11
  Image Tools Format tab, 270
  Lync 2010, 14–15
  main technologies of, 8
  mobile device optimizations, 174–175
  Office Web Apps, 16, 151, 152–172
  online and offline options, 37
  online and offline use, 279–283
  online training modules, creating in, 290–292
  Outlook view, 11–13
  productivity tools, 284. *See also individual tool names*
  sales promotions, tracking with, 287–289
  security capabilities, 9–10
  SharePoint, 13–14. *See also* SharePoint Online
  small business services, 36–41
  uptime, 10
  uses of, 8–9
  versions, 18, 27
Office 365 blog, 21
Office 365 Desktop Setup utility, 32
Office 365 Enterprise, 27
  Exchange Online access, 38
  Microsoft Office 2010 Professional Plus access, 32
Office 365 for Education, 27
Office 365 for Small Business, 18, 27
Office 365 forums, 21
Office 365 icons, 20
Office 2010
  checking in files from, 135
  co-authoring capabilities, 167–168
  getting ready to use, 31–35
  Office Web Apps, 153
  and Office Web Apps, differences among, 156–157
  protection features, 133
  ribbon, 160
  translation tools, 88–89
  updates, 16
Office 2010 Mobile Apps, 35
Office 2010 Professional Plus pay-as-you-go option, 16
Office Web Apps, 16, 31–32, 151, 152–172
  co-authoring with, 165–168
  ease of use, 154
  editing levels, 161–165
  Excel Web App, 168–169
  files, closing, 157–158
  files, creating, 154, 157–158
  files, saving, 157–158
  functionality of, 154–155
  limitations of, 156–157
  on mobile phones, 156
  OneNote Web App, 169–172
  Outlook Web App, 203–228
  tools, choosing, 160
  versions, 154
  Word Web App, 156, 158, 166
one-to-one communications, 90
OneNote
  for brainstorming, 285
  co-authoring capabilities, 167
  content creation in, 291
OneNote Web App, 169–172
online broadcasting, 92–93
online meetings, 90–91
  hosting, 287
  setting up, 15
  tools for, 229–254
online status
  change alerts, 241–243
  during Lync calls, 249
  presence indicators, 244
online training modules, developing, 290–292
Open Link In A New Window option, 268
Outlook 2010
  folders, connecting to SharePoint Online, 132
  setting up, 34–35, 57–62
  workflow notifications, 147–148
Outlook view, 11–13
  contact presence icons, 12
Outlook Web App, 19, 37–38, 203–228
  Advanced Search tools, 213
  Calendar tool, 218–223
  Check Messages tool, 205
  Contacts tool, 224–227
  Conversation History folder, 247
  email, checking and managing, 204–218

Outlook Web App (*continued*)
  Filter tool, 214
  folders, creating, 210–211
  mail preferences, setting, 215–216
  main window, 204–205
  meeting requests, creating, 216–218
  Options tool, 209
  presence indicators, 244–245
  Search tool, 212, 226
  Share tool, 221
  Tasks tool, 227–228
  themes, choosing, 209–210
Overwrite Existing Files option (SharePoint Online), 122
Owners group (SharePoint), 66

P

Page Background dialog box, 259
page width for websites, 258
pages
  adding to team site, 109
  content, adding to, 110–113
  designing, 127
Password Strength bar, 23
passwords
  changing, 22, 54–55
  for notebooks, 171–172
  strength of, 23–24
performing stage of team life cycle, 81
permission levels, 64–65
permissions
  assigning, 51–52
  assigning to groups, 66–67
  tracking, 295
personal notes, adding to Lync window, 233
phone calls, 40
phones. *See* mobile phones
photo, profile, 23
photos and pictures
  adding to team site, 105–108
  editing, 107–108
  storage folder for, 107
Picture Tools Design tab, 107–108
planned maintenance schedule, 75
posting updates, 103–105
posts, 103–105
  editing, 105
Posts - New Item dialog box, 104
PowerPoint 2010
  broadcast capabiltiies, 199
  on mobile devices, 195–199
  online broadcasting capabilities, 92–93
  presentation prototypes, building in, 291
  slides, creating in, 287
PowerPoint Web App, 92
preferences, setting, 24–25
Preferred Email address, 24
Preferred Phone numbers, 24
presence indicators, 12, 231, 244–245
presence technology, 82
presentations. *See also* PowerPoint 2010
  adding to team site, 289
  broadcasting, 199, 290
  broadcasting online, 92–93
  on mobile devices, 195–199
  prototypes of, 291
  saving and sending from mobile devices, 198–199
  saving as video clips, 291
Preview Pane library style, 127
privacy relationships for contacts, 239–241
Problem Steps Recorder, 74
profile
  administrator management of, 25
  password management, 22
  preferences, setting, 24–25
  profile photo, 23
  setting up, 21–25
programs, sharing, 252
project information management, 203–228
proposal checklist, 297
protection features for files, 133
public cloud computing, capabilities of, 8
public instant messaging, 237
public websites, 255–278
  Bing search box, adding, 258
  closing, 278
  color schemes, choosing, 263–264
  creating, 93–94
  designing, 258, 260
  displaying for editing, 256
  experience for site visitors, 260
  functions of, 98

public websites (*continued*)
  gadgets, adding, 275–276
  headings, formatting, 265–266
  hyperlinks, adding, 267–268
  image optimization, 259
  images, inserting, formatting, and aligning, 269–271
  keywords, entering, 277
  lists, creating, 266–267
  logo, adding, 262–263
  Member Login button, 258
  navigation layout, selecting, 273–274
  Open Link In A New Window option, 268
  page background, applying, 259
  pages, adding and organizing, 271–273
  page width and alignment settings, 258
  previewing and publishing, 277–278
  search engine optimization, 276–277
  site header, changing, 261–262
  site slogans, 262
  text, adding and formatting, 256–257, 264–268
  theme for, 260
Purchase window, 71

R
reading pane, 204, 206
  hiding, 223
  Tasks view, 228
real-time collaboration, 39
real-time communication, 14–15
re-mirroring storms, 10
Reset User Passwords link, 54
resource conservation, 3, 6
Resources column, 21–22
Room Mailboxes, 59

S
Safari, 151
sales promotions, tracking, 287–289
saving
  to computer, 281–282
  on mobile devices, 189–190, 194, 198
scheduling
  Calendar tool, 218–223
  location setting and, 233
  managing, 11–13
  of team meetings, 87
Scheduling Assistant, 217, 218
screen shots, capturing, 74
search box, 21, 71
search engine optimization, 276–277
searching
  for contacts, 226–227
  for email messages, 212–214
security
  of calendars, 86–88
  Office 365 features, 9
Select A Location arrow, 51
Select A Theme gallery, 210
Select A Theme window, 100
Select People dialog box, 143
Select Picture dialog box, 106
sending, from mobile devices, 190, 194, 199
servers, share-the-load approach, 6
Service Health screen, 75
service requests, creating, 72–74
Service Requests window, 72–73
services, user access to, 71
Set Sign-in Status option, 52
Setup dialog box, 258
Shaded library style, 127
share-the-load servers, 6
Share Your SharePoint Site window, 115
shared space. *See also* team site
  creating, 81–86
SharePoint, 13–14
  editing tools, 14
SharePoint Designer, 127
SharePoint Online, 39–40
  announcements area, 85
  document libraries, 84–85, 117–136
  documents, uploading to, 133
  Editing Tools Insert tab, 98
  Express Sites, 96–97
  file management capabilities, 117–136
  finding, 82
  folders, connecting to Outlook, 132
  groups, 66–67
  Library Tools Documents tab, 130–131, 133
  Library Tools Library tab, 124
  multiple upload feature, 120–122
  Overwrite Existing Files option, 122
  permission levels, 64–65
  posting updates, 103–105

SharePoint Online (*continued*)
  setting up, 62–66
  SharePoint Designer, 127
  site themes, 99–101
  tasks to do in, 86
  team site, 82–83. *See also* team site
  user permissions, assigning, 64–66
  users, adding, 62–64
  websites, creating and modifying, 93–94
  workflow management capabilities, 137–149
SharePoint sites. *See* team site
sharing
  announcements, 85
  Calendar, 221–223
  calendars, 86–88
  desktop, 251–252
  documents, 84
  instant messaging communications, 90
  personal notes, 233
  programs and files, 250–254
  team site, 115–116
Sharing Invitation window, 221
Show More Details link, 33
sign-in status, configuring, 52
Silverlight, 155
Site Assets dialog box, 107
Site Assets folder, 107
site slogans, 262
site themes, 99–101
64-bit systems, 29
Slide Show gadget, 275–276
small business services, 36–41
Small Business version. *See* Office 365 for Small Business
smartphones, 174. *See also* mobile phones
social media tracking, 40
software services, loading, 18
Start This Workflow When A New Item Is Created option, 145
status updates
  alerts, 241–243
  in Lync 2010, 233
storming stage of team life cycle, 81
Stroh, Michael, 178
styles of document libraries, 126–127
Style Sheet dialog box, 266
subscriptions, managing, 70–71
support community, 71
Support Overview page, 71
system status, checking, 72, 74–75
system type, 29

T

tagging contacts, 241–242
task lists, creating, 140
task window, 147
tasks
  assigning, 142, 287
  completed, marking, 146–147
  creating, 227–228
  managing, 228
  tracking, 138–139. *See also* workflows
  workflows, removing from, 148
Tasks tool, 227–228
team environment. *See also* team site envisioning, 79–81
Team Files – Upload Document dialog box, 120–121
Team Files – Upload Multiple Documents dialog box, 121–122
team meetings, 90–91. *See also* meetings
  process of, 91–92
team members
  building trust wth, 6
  contact list of, 294
  information management for, 203–228
  instant contact with, 89–90
  instant messaging, 245–247
  searching for, 143
team sites
  accessing with iPhone, iTouch, and Mac computers, 178
  announcements and notes on, 296
  announcements area, 85
  content, adding, 110–113
  customizing, 95
  displaying, 82–83
  document libraries, 84–85
  editing tools for, 83
  files, accessing, 152
  files, creating from, 154
  files, saving to, 164
  functions of, 86
  items to include on, 83

team sites (*continued*)
  markup styles, adding, 112
  Office Hub, accessing from, 180
  pages, adding, 109
  pictures, adding, 105–108
  planning, 83, 96, 97–99
  secondary pages, 296
  sharing, 115–116
  simple design, creating, 96–97
  text, formatting, 110–111
  text layout, changing, 101–103
  text styles, adding, 111
  theme, choosing, 99–101
  tips for, 296
  tools, adding, 98–99
  updates, posting, 103–105
  Web parts, adding, 113–114
  workflows, adding, 138–139
Team Site Settings page, 65
Team Site tab, 82
Team Site window, 13–14
  Edit tool, 14
  Site Actions options, 14
team space. *See* team site
teams
  benefits of, 4–5
  goals of, 5
  language challenges, 89
  life cycle stages, 80–81
  needs of, 5
  planning work of, 83
  staying in touch with, 4
  use of, 4
teams on the fly, 3
technology, impact on work, 3
Tenant Users group (SharePoint), 66
text
  adding and editing on public websites, 256–257, 264–268
  formatting, 110–111
  formatting on mobile devices, 187–189
  HTML text sizes, 265
  language, coding for, 112–113
  markup styles, adding, 112
text styles, adding, 111
themes
  for mail activity, 209–210
  for public websites, 260
  for team site, 99–101
  for websites, 93–94
32-bit systems, 29
time zone information, meetings and, 88
"Tips for Working in Global Teams" (Doulton), 6
tools
  adding to team site, 98–99
  choosing, in Office Web Apps, 160
touch gestures on mobile phones, 180
tracked changes, working with, 156
translation tools, 88–89
Tuckman, Bruce, 80, 82

U

updates, posting, 103–105
Upload Document dialog box, 120
upload sizes, 159
uptime, 10, 17
  Service Level Agreement, 9–10
Use My Local Drafts Folder option, 134–135, 282
user permissions, assigning, 51–52, 64–66
user profiles, 49
users
  adding, 48–54
  adding multiple, 49–50
  adding one at a time, 48–49
  adding to SharePoint Online, 62–64
  display names, 49
  invitation email message for, 53–54
  licenses, assigning to, 52–53
  locating, 143
  location information, 234
  managing, 47–55
  passwords, 54–55
  SharePoint team site, adding to, 62–64

V

versions of files, managing, 118, 122
video calls, 40, 248–250
  adjusting, 248
  audio and video setup for, 234–235
  launching, 249–250
  setting up, 234–235
video clips, saving presentations, saving as, 291

View tool, 257
Viewers group (SharePoint), 66
views
  of Calendar, 220
  of contact list, 243–244
  of document libraries, modifying, 124–127
  in Outlook Web App, 208–209
Visitors group (SharePoint), 66

W

Web App icons, 152
web-based applications, 6
Web browsers
  editing in, 162–163, 166–167
  files, viewing in, 158, 161–162
  Silverlight plug-in, 155
web meetings, 40
Web parts
  adding to team site, 113–114
  functions of, 113–114
webcam check, 235
webcasts, 3
Website Designers group (SharePoint), 66
websites. *See also* public websites
  cascading style sheets for, 266
  creating and modifying, 93–94
  designing, 127
  functions of, 98
  themes and layouts for, 93–94
Welcome To Lync Wizard, 234–235
What's Happening Today? area, 233
What Would You Like To Do? list, 35
whiteboard sessions, 253–254
Windows Live ID, 19
  signing up for, 18
Windows Live Messenger, 89
Windows Live SkyDrive, 154
Windows Mobile phones, Office Web Apps support, 156
Windows operating system, 32- and 64-bit systems, 29
Windows Phone 7 Plain & Simple (Stroh), 178
Windows 7 phones, 173
  comments, adding, 185–187
  features of, 174
  Office Hub on, 179–181
  Outlook icon, 175
  touch gestures on, 180
Word 2010
  co-authoring capabilities, 167–168
  content creation in, 287, 291
  documents, drafting in, 288, 291
  editing documents on mobile devices, 182–190
  editing files in, 158
  translating content in, 88
Word Web App, 39
  co-authoring in, 166
  editing capabilities, 156
  saving changes in, 158
work, technology's impact on, 3
work teams. *See* teams
Workflow Information screen, 145–146
Workflow Settings tool, 139, 149
workflows, 137–149
  adding, 287
  adding to team site, 138–139
  Choices field, 141
  creating, 139–145
  editing, 144–145
  list or library basis of, 138, 139
  managing, 149
  naming, 140
  notifications, 144, 147
  planning, 138–139
  start options, 140
  Start This Workflow When A New Item Is Created option, 145
  states of, 141
  status, checking, 145–146
  stopping, 148
  task completion, marking, 146–148
  task details, 142–144
  tasks, assigning, 142
  using, 145–149
Workflows screen, 144
Workgroup privacy setting, 240
working virtually, 4
worksheets
  in Excel Web App, working with, 157–158, 168–169
  linking to live data, 289
  opening on mobile devices, 191
  reviewing and editing on mobile devices, 190–194

What do you think of this book?

We want to hear from you!

To participate in a brief online survey, please visit:

microsoft.com/learning/booksurvey

Tell us how well this book meets your needs—what works effectively, and what we can do better. Your feedback will help us continually improve our books and learning resources for you.

Thank you in advance for your input!

Microsoft® Press